TRAINING TRACKER

User Guide

Version 2.1

A BUSINESS Performance Pty Ltd product

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1. About Training Tracker

Benefits

Congratulations on your purchase of *Training Tracker*. *Training Tracker* is your one stop solution to tracking training activity and costs in your organization. It is especially suited for managing training in small to medium-sized organizations and single departments in large organizations. By using *Training Tracker* you can:

- save several hundreds of dollars through avoiding the purchase of dedicated high-end training administration software
- save many hours work and the frustration of learning an overblown and complex training administration program
- keep everyone in your organization informed with a range of automated reports
- keep on top of your training providers, budget and schedule with up-to-the-minute, automated budget and activity charts
- update or report on training anywhere, anytime without the need for dedicated training administration software

Almost every business nowadays has the Microsoft Office suite of products with Microsoft Excel installed on their computer. It makes sense to leverage off the software that you already have to benefit from a relatively inexpensive and easy to use training administration tool.

Features

In spite of its small size, *Training Tracker* is packed with features whilst retaining the familiarity of the Microsoft Excel interface and functions. Features include:

- central index for easy point and click access to all Training Tracker components
- automatic generation of a variety of preset activity and expenditure reports
- ability to report two levels deep in your organization
- preset formats for all sheets, reports and charts, ready for printing
- provision for you to add your own charts and reports
- easy copying of reports and charts to your favorite program
- import data from other databases and data sources
- ability to export data for use elsewhere
- option to design your own customized warnings and reminders flags
- use of dropdown lists that save you many hours of typing
- substantial error proofing for maintaining data integrity
- administration file small enough for easy transportability
- ability to update your administration file almost on any PC anywhere, anytime

2. System Requirements and Compatibility

Hardware and Software Requirements

The *Training Tracker* template and sample administration file are not standalone programs. They require Microsoft Excel installed on your computer to display and use this tool. Versions of Microsoft Excel that will open the template and sample files are Excel 2002(XP), 2003, 2007 and 2010.

Operating system requirements are Windows Me, Windows NT, Windows 2000, Windows XP, Windows Vista or Windows 7.

Hardware requirements are any IBM PC or IBM PC compatible computer capable of running at least one of the above versions of Microsoft Windows and Microsoft Excel for Windows. This template and sample administration file are not compatible with Microsoft Excel for Macintosh. If you received the *Training Tracker* files on a portable medium, such as CDROM or flash drive, you will need hardware that is able to read from the portable medium. You will also need at least 20 megabytes of free hard disc space. The template and sample administration file are best displayed with a screen resolution of 800 by 600 or above.

Saving Training Tracker Files

The template and sample administration file are supplied in the Excel 97-2003 Workbook (Compatibility Mode) format to ensure maximum compatibility with all versions of Microsoft Excel. When saving to the Excel 2007 or later format, save your workbook as an Excel Macro-Enabled Workbook (*.xlsm). If you save your workbook as an Excel Workbook (*.xlsx), your file will no longer open correctly when you try to open the workbook again. Use the Excel Macro-Enabled Workbook (*.xlsm) format if you are sure that everyone opening your workbook will be using Excel 2007 or 2010. If people will be opening your workbook with Excel 2002(XP) or 2003, then save as type Excel 97-2003 Workbook (Compatibility Mode). Saving with this file type will ensure maximum compatibility with earlier versions of Excel.

Note: In this *User Guide*, where the Microsoft Office Button is mentioned, substitute File tab if you are using Excel 2010.

3. Getting Started

Training Tracker Files

To use *Training Tracker* effectively, you will need at least a basic understanding of Microsoft Excel. If you are currently a beginner in Excel or have had no previous experience, there are a number of helpful books and Excel courses available to suit the beginner all the way through to advanced users. This *User Guide* assumes that you are at least familiar with the basics of working with Excel and spreadsheets.

Similarly, this guide assumes that you have at least a basic understanding of what is required in administering a training function. To find out more about training administration principles and methods, visit the following websites.

American Society for Training and Development	www.astd.org
Australian Institute of Training and Development	www.aitd.com.au
Irish Institute of Training & Development	www.iitd.ie
Singapore Training and Development Association	www.stada.org.sg

For additional resources, visit the Business Performance Pty Ltd training portal at www.businessperform.com/training

The full working version of *Training Tracker* consists of the following five files:

`TrainingTrackerTemplate.xls`	*Training Tracker* Template
`ImportTemplate.xls`	Data Import Template
`QuickStartGuide.txt`	*Training Tracker* Quick Start Guide
`TrainingTrackerUserGuide.pdf`	*Training Tracker* User Guide (this manual)
`License.txt`	End User License Agreement

The free sample version of *Training Tracker* consists of the following four files:

`TrainingTrackerSample.xls`	*Training Tracker* Sample Administration File
`QuickStartGuide.txt`	*Training Tracker* Quick Start Guide
`TrainingTrackerUserGuide.pdf`	*Training Tracker* User Guide (this manual)
`License.txt`	End User License Agreement

These files are compressed into a single file named `traintracktemp.zip` or `traintracksamp.zip`, depending on whether you acquired the full working version or the sample version only. The *User Guide* is also available for download from the Business Performance Pty Ltd website in Portable Document Format (PDF) at no charge.

Installing and Starting Training Tracker

You may have downloaded the *Training Tracker* compressed file from the internet, received it on a flash drive or CDROM or via email. However you received it, to get started, follow the steps below:

1. Create a new directory on your computer (e.g., `C:\BP-TrainingTracker`) so that the extracted *Training Tracker* files do not get mixed up with your other computer files.
2. Go to the location that contains the *Training Tracker* compressed zip file (e.g., `A:` or `D:`).
3. Right-click on the compressed `traintracktemp.zip` or `traintracksamp.zip` file and select Extract All or Extract To from the list of options. Alternatively, double-click on the zip file to open it.
4. Follow your extraction program's prompts or instructions to decompress the files to the new directory you created in *Step 1* above.
5. If your computer does not recognize zip files, visit www.winzip.com or www.7-zip.org to download the zip file extraction program.
6. Set Microsoft Excel to accept macros.
   a) In Microsoft Excel 2007, set the trust setting to the default setting. To do this, click the Microsoft Office Button or File tab, and then click Excel Options. Then in the Trust Center category click Trust Center Settings. Then click Macro Settings, and then click Disable all macros with notification.
   b) In Microsoft Excel 2003 and earlier, on the main menu bar under Tools > Macro > Security, set the security level to Medium.
7. To start using *Training Tracker*, either:
   a) go to the location in which you extracted the files and double click on `TrainingTrackerTemplate.xls` (full version) or `TrainingTrackerSample.xls` (free sample)

   OR

   b) start up Microsoft Excel, click the Microsoft Office Button and select Open (Excel 2003 and earlier: select File > Open from the main menu bar), navigate to the location in which you extracted the files, select `TrainingTrackerTemplate.xls` (full version) or `TrainingTrackerSample.xls` (free sample) and click the Open button.
8. If a dialog box appears asking you if you want to enable macros, select the Enable Macros or the Enable this content button.

If you inadvertently open *Training Tracker* without enabling macros, simply click the Microsoft Office Button and select Close to close the file (Excel 2003 and earlier: select File > Close).

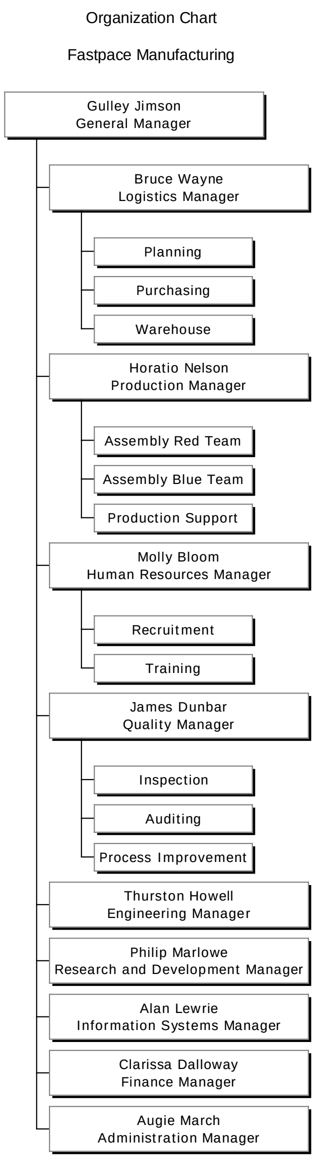
Congratulations, you are now ready to begin learning more about *Training Tracker* and managing your organization's training activities. For an overview of using *Training Tracker*, you can start by reading the *Quick Start Guide* included with the installation pack. If you encounter any problems during the installation process, please consult the items under Installation Problems in the **FAQ** section on p. 40 of this guide.

What is a Zip file?

A zip file is a computer file that can package a number of files into a single file. The files stored in a zip file can be of many kinds: documents, graphics, sound files, and so on. In addition, the files stored in a zip file are compressed to save disk space and download time when someone downloads the file from the internet. You can tell a zip file from the .zip on the end of the file name.

4. Training Tracker Sample Administration File

In order to help you get on the road to managing your training activities with *Training Tracker* as quickly as possible, make use of the sample administration file available from the *Training Tracker* product web page at www.businessperform.com/training-tracker The sample file is fully functional and records a complete year of training activity in a fictitious company, demonstrating all of the features of *Training Tracker*. We encourage you to add new training records and modify existing records to see the impact on charts and reports. The only point of difference between the sample administration file and the template is that you cannot save any changes you make to the sample administration file. Under no circumstances use the sample administration file to administer an actual training function.



The fictitious company is named Fastpace Manufacturing. Fastpace Manufacturing designs and builds telecommunications equipment and employs 115 people in various jobs. The number of different roles in the company amounts to sixty and covers the full gamut of professional, managerial and semi-skilled occupations. The company is structured around nine departments and various groups, as shown here in the organization chart.

All employees in Fastpace Manufacturing receive training. Most of the training delivered is sourced from external training providers. However, the company employs four internal trainers within the Human Resources department. The trainers are Atticus Finch, Charles Kinbote, Gordon Gekko and Margaret Schlegel.

The training budget for outsourced training for the year July 1 2008 to June 30 2009 was $150,000. A target was also set for the number of training hours delivered by the Human Resources department internal trainers. For the year 2008-2009, this was set at 450 hours.

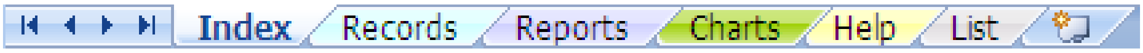
The sample administration file records over 500 separate training events over the one-year period. By using *Training Tracker*, the Human Resources Manager was able to submit at the conclusion of each month to each department manager, team leader and supervisor a complete record of training for each of their direct reports. The automated reports indicated individual employee training information as well as aggregated amounts of training hours and money spent. It was also a simple matter to track actual expenditure to budget and the total training hours delivered by each of the internal trainers. As *Training Tracker* creates up-to-date reports at the click of a button, the Human Resources Manager was able to satisfy easily demands by supervisors and managers for *ad hoc* reports.

With the automated charting facility, the Human Resources Manager also found it easy to produce summary charts for use in management and team presentations. We invite you to take the time to review the various reports and charts available on the **Reports** and **Charts** sheets.

Over the year, fifteen different external training providers were used to design and deliver training to Fastpace Manufacturing employees. *Training Tracker* allowed the Human Resources Manager to track the status of bookings, invoices and payments in real time. In addition, the total training expenditure on each training provider was transparent, allowing the Human Resources Manager to negotiate substantial volume discounts from preferred providers.

5. Training Tracker Template Structure

Workbook Structure and Error Proofing



The *Training Tracker* template consists of six sheets, with the **Index** sheet appearing first. The **Index** sheet is your central point for accessing easily all of *Training Tracker's* functions. The **Records** sheet appears next. This is where you will enter most of your administration data. The **Reports** and **Charts** sheets contain the preset reports and charts for reporting on your training function. The click 'n' go preset reports provided will satisfy the majority of your reporting requirements. These reports and charts summarize and present your training data along a number of dimensions. These dimensions include individual employee, time period, cost, training hours, department, group, training provider, purchase status and training results.

The structure of the workbook is flexible, allowing you to reorder sheets and insert new sheets as you need them. However, to preserve the integrity of the existing reports, the workbook will not allow you to rename existing sheets. There is scope for you to customize existing reports and charts and to add your own if you so wish. You may also use Excel's standard features to present your data the way you want – with filtering, search, print area, freeze panes and so on. If you are not already familiar with these features, look them up in Excel's Help so that *Training Tracker* will even better serve your purposes.

Following the reporting sheets is a summary **Help** sheet. This sheet contains basic instructions for the database administrator. You can freely add and edit instructions to suit your organization. The final **List** sheet is where you enter your company setup information.

Our fundamental philosophy behind designing *Training Tracker* was to make it modular, giving you the flexibility in deciding which functions you wanted to use and which to leave aside. For example, you may have no costs associated with training. In that case, you may ignore the expenditure reports and charts. Similarly, you may not source training from external providers at all. In that case, simply ignore the *Provider* field on the **Records** sheet. Ignoring non-essential functions or fields will have no impact on what you do use. In this way, *Training Tracker* is as complex as you want it to be and you avoid having a steep learning curve to negotiate.

We have also built into *Training Tracker* a substantial amount of error proofing. For example, *Training Tracker* will not allow you to enter any data other than numbers in the *Cost* and *Hours* fields on the **Records** sheet. Data entry on the **Records** sheet is mostly performed using in-cell dropdown lists from lists that you define on the **List** sheet. In this way, you will avoid reporting and charting errors that could result from inconsistencies in spelling and syntax.

Worksheet Functions

The following is a brief description of each of the sheets contained in the template.

Index Sheet

Main portal for all *Training Tracker* functions, centered around the four principal management activities of Set Up, View Reports, View Charts and Migrate Data.

Records Sheet

Primary sheet for entering training event data. Data fields include *Participant Name*, *Department*, *Group*, *Role*, *Course*, *Provider*, *Trainer*, *Start Date*, *End Date*, *Hours*, *Cost*, *Type*, *Results*, *Outcome* and *Status*.

Reports Sheet

Reporting sheet for displaying the following 13 click 'n' go training reports:

<u>Manager Reports</u>

- Activity by Participant
- Training Activity by Group
- Training Activity by Role

<u>Expenditure Reports</u>

- Expenditure by Department
- Expenditure by Group
- Expenditure by Provider
- Expenditure by Purchase Status

<u>Hours Reports</u>

- Hours by Department
- Hours by Group
- Hours by Trainer
- Hours by Training Provider
- Hours by Training Outcome
- Hours by Training Results

Charts Sheet

Charting sheet for displaying the following 7 click 'n' go training charts:

<u>Expenditure Charts</u>

- Expenditure by Department
- Expenditure by Group
- Expenditure by Provider

<u>Hours Charts</u>

- Hours by Department
- Hours by Group
- Hours by Trainer
- Hours by Training Provider

Help Sheet

Stores and displays concise instructions on how to complete fields on the **Records** sheet.

List Sheet

Primary sheet for entering your organization's setup information. Setup data fields include participant names, department names, group names, role titles, course names, training provider names, trainer names, training event types, participant results and enrollment/payment statuses.

The next section of this *User Guide* will take you through setting up *Training Tracker* for use with your organization. The following sections will then explain in detail each of the *Training Tracker* sheets, allowing you to get the most out of *Training Tracker*. You may find it beneficial to read these instructions whilst reviewing the sample administration file.

6. Setting Up Training Tracker

Setup Steps

Setting up *Training Tracker* for use in your organization involves four steps:

i.	Pre-preparation	– collecting your organization's information
ii.	Configuration	– entering your organization's information on the **List** sheet
iii.	Setup Help sheet	– deciding decision rules and entering administrator help text
iv.	Historical Data Entry	– entering historical data on the **Records** sheet

Each of these three steps will now be explained in turn.

i. Pre-preparation

To complete setup of *Training Tracker* for your organization, you will need the information listed in the following table. The information types marked with ♦ are mandatory. These data are fundamental to the database and without these data, the database reporting features will not operate effectively.

Table 1: Required Organization and Employee Data

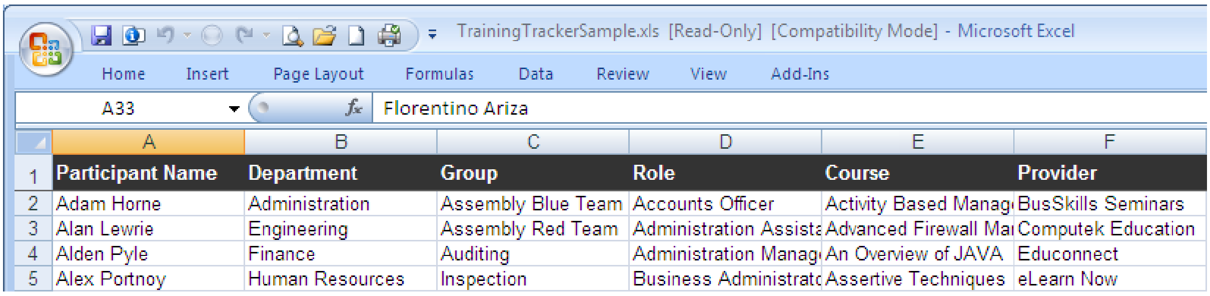
ITEM	INFORMATION TYPE	EXPLANATION
1. ♦	List of employees/training participants	Names of participants eligible to attend training sessions. Refer to organization chart or human resources employee database. Participants are not necessarily employees of organization or restricted to employees of organization. Contractors, consultants and public may be included, for example.
2. ♦	Organization chart showing departments and sub-departments	The structure of the organization or organizational unit that is within the scope of the training reports that you wish to produce. The database allows reporting up to two organizational levels deep; that is, department and group. If non-employees are included, then obtain a list of the names of external organizations to which participants belong.
3.	List of Job Roles or Job Titles	The position titles attached to people's jobs. Refer to organization chart, individual job descriptions or human resources employee database.
4. ♦	List of training courses conducted or to be conducted	Names of training programs, courses and sessions for which you wish to track and report.

ITEM	INFORMATION TYPE	EXPLANATION
5. ♦	List of internal and external training providers	Names of internal departments offering training services within your organization and names of outsourced training organizations.
6.	List of internal and external trainers	Names of internal employees and external trainers delivering training programs and courses.
7.	List of training delivery methods	Names of delivery methods and/or delivery mediums used in your organization.
8.	List of assessment result values	Names of assessment result types given to participants following formative or summative evaluations of participant performance. For programs in which participants are not assessed, use "Not Assessed" or similar.
9.	List of course completion values	Names of participant attendance outcomes, such as "completed", "withdrawn", "no show", and so on.
10.	List of enrollment/payment status values	Names of financial steps occurring during course enrollment and payment process. Review your enrollment/payment process for discrete accounting points.

For information items 1 to 6 above, do not be too concerned if your lists are incomplete. You just need enough to get started. New items may be added at any time. For items 7 to 10, you will need a good idea of these values, as changing these values at a later date may involve much time-consuming amendments to existing training records. Where you will be using these fields in the database, review seriously your current processes and standards in order to settle on a common set of values.

ii. Configuration

Once you have all of the setup data required, go to the **List** sheet or click on *Lists* in the Set Up group on the **Index** sheet. The **List** sheet contains all of the lists used by the **Records** sheet in-cell dropdown feature. When the database administrator clicks on a record cell within a particular field, such as *Participant Name*, a dropdown list of all allowable values appears. In this case, a list of all participants is presented to the administrator for selection. The advantage of using in-cell dropdown lists is that reports and charts are much less prone to errors arising from variations in spelling and syntax.



On the **List** sheet, the names of the various lists appear in the first row of the sheet. Before working on the **List** sheet, first unprotect the sheet by selecting the Review tab > Changes > Unprotect sheet (Excel 2003 and earlier: Tools > Protection > Unprotect sheet). In order to prevent inadvertent changes, the sheet is protected again each time you select the sheet. For each list, enter the values that you had collected in the pre-preparation step. For example, for the *Participant Name* list, enter the names of participants, starting at Cell A2. Enter the next participant name in Cell A3, and so on. Do not be concerned if the values you enter are not in alphabetical order. The lists may be ordered as the final step. Enter all values according to the table and explanatory notes on the following page. Information types marked with ♦ are mandatory. These data are fundamental to the database and without these data, the database reporting features will not operate effectively. (To explore the basic structure of the **List** sheet and suggested values, check out the configuration of the fictitious company, Fastpace Manufacturing, included in the sample administration file.)

You may wish to copy and paste values from another software file, such as another Microsoft Excel workbook. To do this, firstly, unprotect the **List** sheet by selecting the Review tab > Changes > Unprotect sheet (Excel 2003 and earlier: Tools > Protection > Unprotect sheet). Then, in order to preserve the formatting of the **List** sheet, do not use the standard paste function. Instead, once you have copied your data to the Windows Clipboard, click the Home tab > Clipboard > Paste > Paste Values (Excel 2003 and earlier: Edit > Paste Special > Paste – Values). If your participant or employee name data is contained in two fields (e.g. *First Name*, *Last Name*), see page 13 below for instructions on how to convert your data to a single field.

If your organization holds a significant amount of data, you may wish to import all of your data in one step. To make your job easier, we have included with *Training Tracker* a special import template. To find out more, see the section on **Importing Data** on page 38 below.

Table 2 on the following page details the purpose of each list and relevant application notes. The information types marked with ♦ are mandatory. These data are fundamental to the database and without these data, the database reporting features will not operate effectively.

Table 2: List Sheet Fields

ITEM	INFORMATION TYPE	LIST	NOTES
1. ♦	List of employees/training participants	Participant Name	Use either “First Name Last Name” or “Last Name, First Name” format. The format you choose will appear as such in the in-cell dropdown list on the **Records** sheet.
2. ♦	Organization chart showing departments and sub-departments	Department Group	Groups are at the next organizational level below departments. If you wish to produce reports on the department managers as a group, create a department named “Management Team” or similar.
3.	List of Job Roles or Job Titles	Role	Enter Roles or Titles as they appear on job related documents.
4. ♦	List of training courses conducted or to be conducted	Course	Enter the name of courses as they appear on course information documents. Avoid using abbreviated names, as these may not be understood at a later date or by others.
5. ♦	List of internal and external training providers	Provider	Enter external provider names as registered business names and internal training provider names as formal department or training center names. Avoid using abbreviated names, as these may not be understood at a later date or by others.
6.	List of internal and external trainers	Trainer	Use either “First Name Last Name” or “Last Name, First Name” format. The format you choose will appear as such in the in-cell dropdown list on the **Records** sheet.
7.	List of training delivery methods	Type	Enter the primary delivery methods or mediums. Options here include: Classroom, Webinar, Teleconference, Internet/Intranet, Structured Reading, Seminar, Lecture, Workshop, Conference, On the Job, Action Learning, Simulation, Books/Journals, CDROM/DVD, MP3, Television, Video Tape, Audio Tape, Face to Face, Teleconference.
8.	List of assessment result values	Results	Enter the assessment result types actually used by your organization. Options here include: Competent, Not Yet Competent, Passed, Failed, Not Assessed.
9.	List of course completion values	Outcome	Enter participant attendance outcomes actually used by your organization. Options here include: Completed, Withdrawn, Cancelled, No Show, Deferred, Ongoing.
10.	List of enrollment/payment status values	Status	Enter enrollment and accounting steps. Options here include: Booked, Invoice Received, Invoice Paid, Not Invoiced, Refunded.

Once the setup data is entered, you may sort each list in either ascending or descending order. To sort a list, select the items in the list and select the Data tab > Sort & Filter (Excel 2003 and earlier: Data > Sort). If you leave one or more blank cells between list items in any one list, items appearing below the blank cell will by default not appear in the in-cell dropdown list on the **Records** sheet. For this reason, *Training Tracker* automatically removes blank cells on exiting the **List** sheet. Sorting your lists with Excel's sort command will also automatically remove blank cells.

Converting Employee Data

Training Tracker uses employee/participant name and trainer name data as a single field. If your company data is supplied in two fields (e.g., *First Name*, *Last Name*), then follow the instructions below to convert the two fields into a single name field. The example below is for converting *Participant Name* data.

1. Open *Training Tracker*.
2. Unprotect the **List** sheet.
3. In Column L add the field name *First Name* in the header row.
4. In Column M add the field name *Last Name* in the header row.
5. Copy your participants' first names to Column L.
6. Copy your participants' last names to Column M.
7. In Cell A2, under *Participant Name*, enter the formula:

   ```
   =L2&" "&M2
   ```

   (Ensure that you leave a space between the quotation marks.)
8. Copy the formula in Column A down to the last row in which you entered participants' names.
9. Select all the names displayed in Column A.
10. Copy all the names to the Windows Clipboard (Ctrl + C).
11. Replace the formulae in Column A with values by clicking the Home tab > Clipboard > Paste > Paste Values (Excel 2003 and earlier: Edit > Paste Special > Paste – Values).

The above steps format each participant's name as *First Name Last Name*. If you wish to have the participants' names displayed in the format *Last name, First Name*, then use the following formula instead in *Step 7* above:

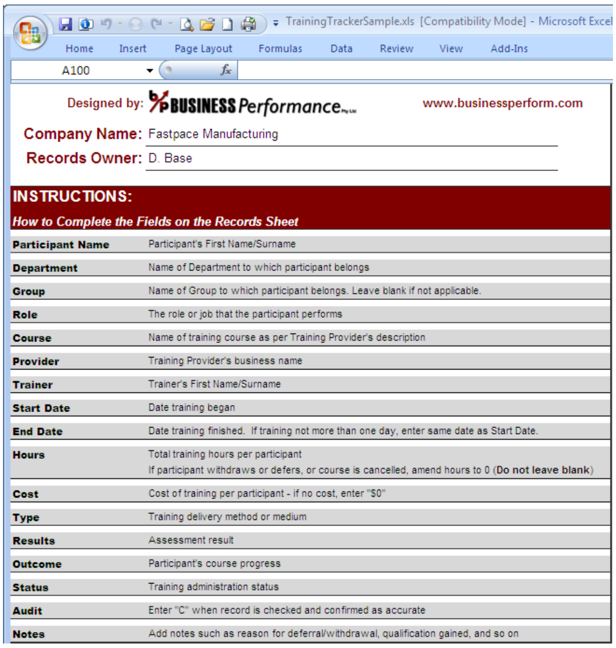
```
=M2&", "&L2
```

The same process can be used to convert trainer names used in Column G of the **List** sheet. In this case, enter the formula used in *Step 7* above in Cell G2 instead.

If you are importing your company data from another database, you can perform the conversion at the time of import by using our special import template. In this case, follow the steps above using the import template instead of the *Training Tracker* template. For details on how to import data from another source, refer to the **Importing Data** section of this guide on page 38 below.

To find out more about the **List** sheet, including customizing the sheet, updating employee and company details and adding additional fields, such as *Employee I.D.* and *Course Code*, refer to the **Customizing Training Tracker** section of this guide on page 31 below.

iii. Setup Help Sheet



Once the setup of the **List** sheet is completed, the next step is to decide on business rules regarding the entry of data on the **Records** sheet and to document those rules on the **Help** sheet. This is also a pertinent time to add any other basic help instructions or tips. The **Help** sheet is intended to assist the database administrator in entering data consistently and in a way that will maintain the accuracy of generated reports and charts.

By default, the **Help** sheet contains a standard set of basic instructions for the database administrator. Modify the **Help** sheet as is appropriate for your organization and circumstances. In order to prevent inadvertent changes to the **Help** sheet, the sheet is protected each time the sheet is activated. To unprotect the sheet, select the Review tab > Changes > Unprotect sheet (Excel 2003 and earlier: Tools > Protection > Unprotect sheet).

You will need to decide business rules on some database entry actions. The most important of these are as follows. The *Hours* field on the **Records** sheet records the number of hours spent by each participant in the training event. Courses of one-day duration may vary in length from course to course and from provider to provider. For example, one-day course *XYZ* from provider *ABC* may last 5.5 hours whilst the same course from provider *DEF* may last 7.5 hours. In these cases where a participant is away for a full working day, you will need to decide whether to record the true duration or settle on a standard day, in line with the participant's standard working hours.

Secondly, you will need to decide how to record training hours in cases where the participant cancels, withdraws or does not show up. In these instances, if you record the nominal course hours, this will skew the various reports and charts showing aggregate training hours spent by participants in training. These reports will then overstate the amount of hours spent in training. In order to avoid this, one option is to set the participant training hours in these cases to zero.

A similar situation holds for the *Cost* field. You have the same option of recording zero participant cost in those cases where the participant cancels, withdraws or does not show up **and** the charge is either cancelled or refunded. You will also need to consider how to enter costs for free seminars and other "no charge" training events.

If you elect, in the cases above, to render hours/cost to zero, you will need to decide whether to enter zero in the relevant cell or to leave the cell blank. One advantage of entering zero is that there can be no confusion in the future over whether the cell was left blank inadvertently. Once you have decided these business rules, the **Help** sheet serves as an appropriate and convenient place for the database administrator to refer to them as needed.

The question of how many database administrators ought there be may arise. Our experience is that there should be no more than one database administrator per database, with one backup administrator to cover unavailability of the primary administrator. The reason for this is that with two or more primary administrators, the data can quickly lose accuracy as a result of miscommunication between administrators and lack of overall ownership of the integrity of the database.

iv. Historical Data Entry

When you have completed configuring the database and decided on the data entry rules, you may want to enter earlier training activity data into the database. If so, decide how far back in time you wish to go. The beginning of a financial year or calendar year marks a convenient point from which to start. Ensure that you have at hand all of the necessary data for the period in which you wish to enter records. Go to the **Records** sheet and for the first training event enter the first participant's name in Cell A2, selecting the participant's name from the dropdown list. Proceed across the same row, entering the remaining data for that participant relevant to that training event.

Review the sample administration file for an example of a completed **Records** sheet. For more detail on entering data on the **Records** sheet, refer to the **Records Sheet** section of this guide on page 17 below.

7. Working with Training Tracker

Index Sheet

The **Index** sheet is the central point in *Training Tracker* for navigating to all of the areas and functions contained within the template. This sheet is also useful for seeing *Training Tracker* at a glance, offering as it does a summary of its functions. The sheet groups *Training Tracker's* functions around the four central training management activities:

- Set Up
- View Reports
- View Charts
- Migrate Data

Each sub-activity button is hyperlinked for ease of navigation. For example, click on the *Records* button or the *Reports* button to quickly go to the **Records** or **Reports** sheet.

The **Index** sheet also provides the access point for importing and exporting your user data. These two functions are contained in the *Migrate Data* group. The *Export* function allows you to export your data to a separate Excel workbook. On the other hand, the *Import* function gives you the ability to import your data from another *Training Tracker* workbook or from a previous version of *Training Tracker*. See page 37 below for more information on migrating your data.

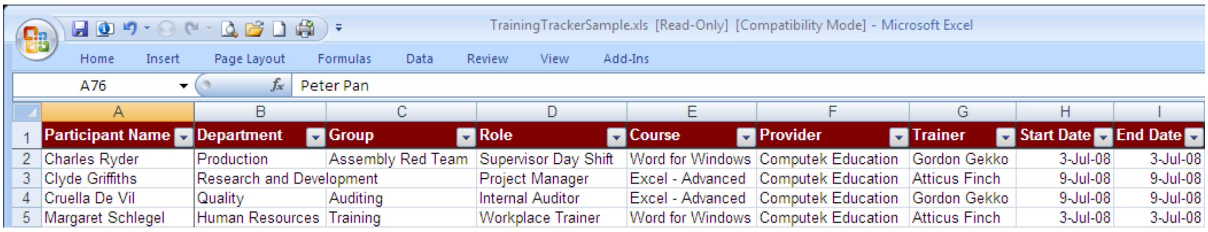
If you are using the sample administration file, moving up to the full working version of *Training Tracker* is easy. When you are ready to purchase the full working version, simply click on the **Buy Now!** button located at the top of the **Index** sheet. You will be taken to the online *Training Tracker* Order Form. Ensure that you have a live internet connection before clicking on the button.

Records Sheet

Records Type

The **Records** sheet is where you will enter your training activity data. Before entering your data, you will need to set up your organization's information on the **List** sheet. Please refer to the instructions for entering your setup information on page 9 of this guide.

The **Records** sheet contains the data field names in the first row at the top of the sheet. Each row under the field names constitutes one record in the database. The *Training Tracker* database is event based, with each row on the **Records** sheet recording one training event. An event is counted as one training participant undertaking one training program or course. A training event may span any number of days or sessions.



	A	B	C	D	E	F	G	H	I
1	Participant Name	Department	Group	Role	Course	Provider	Trainer	Start Date	End Date
2	Charles Ryder	Production	Assembly Red Team	Supervisor Day Shift	Word for Windows	Computek Education	Gordon Gekko	3-Jul-08	3-Jul-08
3	Clyde Griffiths	Research and Development		Project Manager	Excel - Advanced	Computek Education	Atticus Finch	9-Jul-08	9-Jul-08
4	Cruella De Vil	Quality	Auditing	Internal Auditor	Excel - Advanced	Computek Education	Gordon Gekko	9-Jul-08	9-Jul-08
5	Margaret Schlegel	Human Resources	Training	Workplace Trainer	Word for Windows	Computek Education	Atticus Finch	3-Jul-08	3-Jul-08

The database is an *historical* record, capturing participant and course particulars as at the time of the training event. So, if an employee is transferred to another department or group within your organization, do not alter previous records in the database for that employee. For department and group reporting, each record stays with the department and group to which the employee belonged at the time of the training event.

For example, say George Markham transferred from the Administration department to Information Systems on 1 November 2008. Then, all training undertaken by George Markham prior to this date will appear in Administration department reports, whilst all training undertaken after this date will appear in Information Systems reports. A similar situation holds for changes to participant names and roles and changes to course and provider names.

Records Sheet Fields

The **Records** sheet contains seventeen data fields. A description of each field is given in the table on the following page. Some fields are required for selected reports on the **Reports** and **Charts** sheets. For example, if you do not enter data in the *Results* field, no participant results information will be reported in the *Hours by Training Results* report. The fields required by the preset reports available on the **Reports** and **Charts** sheets are indicated in the following table with the ♦ symbol.

Table 3: Records Sheet Fields

- **Participant Name:** The name of the participant undertaking the training. Select from dropdown list.
- **Department:** The organizational unit to which the participant belongs. Select from dropdown list.
- **Group:** The organizational sub-unit to which the participant belongs. Select from dropdown list.

Role: The job role, job title or position of the participant. Select from dropdown list.

- **Course:** The name or title of the program, course or training session. Select from dropdown list.
- **Provider:** The business name of the external training provider or department/training center name of the internal training provider. Select from dropdown list.
- **Trainer:** The name of the teacher, instructor, trainer, facilitator or coach. Select from dropdown list.
- **Start Date:** The first day of the training event. Valid formats are 30/5/09, 30-5-09 and 30 May 09. [**Note:** If your regional settings are set for US, valid formats are 5/30/09, 5-30-09 and May 30 09.]
- **End Date:** The last day of the training event. Valid formats are 30/5/09, 30-5-09 and 30 May 09. [**Note:** If your regional settings are set for US, valid formats are 5/30/09, 5-30-09 and May 30 09.]
- **Hours:** The total number of hours spent by the participant in the training event. Unit is hour and valid values are 0.00 to 5,000.00.
- **Cost:** The cost per participant of the training event. Unit is $ and valid values are $0.00 to $100,000.00.

Type: The primary training delivery method or medium. Select from dropdown list.

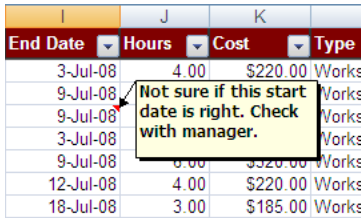
- **Results:** The training participant's assessment result. Select from dropdown list.
- **Outcome:** The training participant's attendance outcome. Select from dropdown list.
- **Status:** The current enrollment/payment status. Select from dropdown list.

Audit: The audit status of the record. Enter C when record is verified prior to printing reports. Unverified records are indicated with orange cell shading.

Notes: Ancillary notes, such as course and cost details, reschedules and so on. This is a free text field.

If you wish to add additional fields, such as *Employee I.D.* or *Course Code*, see page 31 below.

Adding Comments

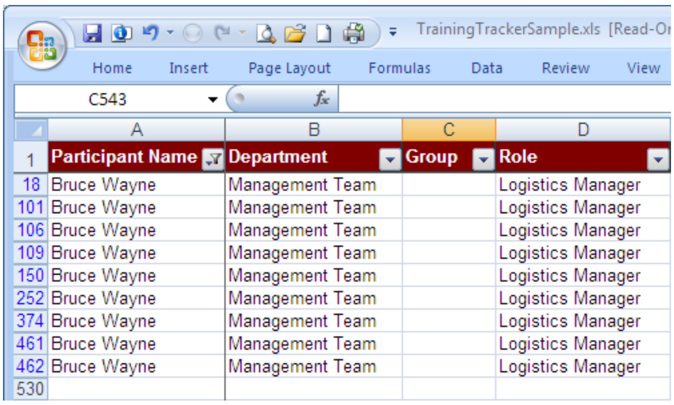


You may add your own notes to any field in any record by using Excel's standard comments feature. To add a comment, first unprotect the **Records** sheet. Then, select the cell for which you want to add a note and select the Review tab > Comments > New Comment (Excel 2003 and earlier: Insert > Comment), or right-click on the cell and select Insert Comment from the shortcut menu. To find out more about Excel's comments feature, search on "comment" in Excel's Help.

Filtering Records

The arrow appearing next to each field name is Excel's standard filter arrow. Use these to filter the records data table to show only the items that you are interested in. For example, to show only those training records where Bruce Wayne was a training event participant, click on the filter arrow in the *Participant Name* field and from the dropdown list, ensure that only Bruce Wayne's name is checked. To display only those events for which an invoice has been received, click on the filter arrow in the *Status* field and make sure that the only item checked is Invoice Received. A funnel icon will appear next to the filter arrow for that field (Excel 2003 and earlier: arrow turns blue) to indicate that the list is currently filtered.

You can also apply a custom filter. For example, to display only those training events where the start date is between 1 January 2009 and 31 March 2009, click on the filter arrow in the *Start Date* field and select Date Filters > Custom Filter from the dropdown list (Excel 2003 and earlier: Custom Filter). Enter the respective dates in the Custom AutoFilter dialog and click on the OK button. You can also filter on more than one criterion by simply filtering one other field whilst the first field is filtered. Don't forget to turn filtering off when you have finished by selecting Clear Filter from the dropdown list on the filter arrow (Excel 2003 and earlier: (All)). To find out more about Excel's filtering feature, search on "filter" in Excel's Help.



Copying Data

In order to protect the integrity of data on the **Records** sheet and to minimize data entry errors, a number of fields are set up with Excel's data validation feature enabled. The data validation feature restricts the type of data you can enter into a cell. For example, *Employee Names* and *Roles* may only be entered from the predefined lists you set up on the **List** sheet. Date and number formats are similarly restricted to the correct type, for example, in the *Start Date* and *Cost* fields.

These data protection measures may be overridden inadvertently with some copy and paste, drag and drop and auto fill operations. In order to prevent accidental override of data validations, *Training Tracker* restricts the type of cell entry operations that you can perform on the **Records** sheet.

Various copy and paste, drag and drop, auto fill and fill left and fill right operations are disabled in *Training Tracker*, depending on the version of Excel you are using. As the data validation settings for cells in the same column are identical, it is safe to copy data within the same column. The fill up and fill down operations, therefore, remain enabled.

Using the fill up and fill down options will save you substantial amounts of time in entering repetitive data. In those cases where you have a number of participants attending the one training course, enter the course data for one participant and then fill down to the remaining participants. To fill down to the cells below, first select the data in the row that you wish to copy, along with the blank cells to which you want to copy the data. Then, select the Home tab > Editing > Fill > Down (Excel 2003 and earlier: Edit > Fill > Down), or simply press Ctrl + D.

To copy data safely from another source, follow these steps:

1. Copy the data to the Windows Clipboard (Ctrl + C).
2. Select the destination cell.
3. Enter cell edit mode (double-click cell or select cell and press F2).
4. Paste data into the cell (Ctrl + V).

If you are copying data to the Clipboard *from* the **Records** sheet, you will also need to enter cell edit mode for the source cell. Always ensure that the source data is of the same type and format as the destination cell data type. For example, do not copy a cost amount to a date cell.

If the data validation settings have been corrupted for a cell or series of cells on the **Records** sheet, select an intact cell above or below the corrupt cell or cells and fill up or fill down using the fill up or fill down operation explained above. To confirm that the validation setting has been returned to normal, enter text in the cell, press Enter and confirm that the "Invalid Entry" message box appears. If you need to copy large volumes of data from another source, such as a list of all employee names, see the section on importing data on page 38 below.

Entering Costs

For some courses, your organization will incur a fixed charge irrespective of the number of participants. In order to simplify the entering of costs in these cases, and to eliminate the possibility of calculation errors, you may enter a formula in the *Cost* field in place of a fixed value. The cost per participant is then calculated automatically.

In these cases, for each participant, enter the following formula in the *Cost* field:

=Total course cost/Total number of participants charged

For example, if total course cost is $9,000 and twelve participants are charged, enter the formula as:

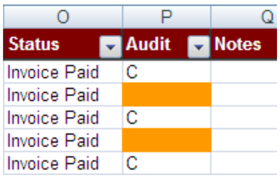
=9000/12

The *Cost* cell will display the result of $750 and this amount will appear in all reports in which that training event is included. (Note that formulae entered on the **Records** sheet are not exported or imported during data migration. During the data import and export process, formulae are converted to values. For more information on data migration, see page 37 below.)

Entering Training Dates and Duration

For training events that begin and end on the same day, enter an *End Date* that is the same as the *Start Date*. In the *Hours* field, record the total number of hours spent by each participant on that training event.

Auditing Records



O	P	Q
Status	Audit	Notes
Invoice Paid	C	
Invoice Paid		
Invoice Paid	C	
Invoice Paid		
Invoice Paid	C	

Prior to compiling and printing reports, you may want to verify that records for the reporting period are complete and accurate. During this checking process, questions may arise that require follow up. The *Audit* field allows you to keep track of which records are verified as complete and accurate and which require follow up actions. *Training Tracker* displays records requiring more information with an orange cell color in the *Audit* field. The orange flag is a quick visual cue for finding records that require more work. When the record is complete and verified, type **C** in the record's *Audit* field. (**C** signifies "Correct".) Once verified, the orange flag disappears. Note that for records in which the *Participant Name* is not entered, the orange flag will not appear. The *Participant Name* is the minimum entry required for a record to be recognized by the audit system.

User Customization

The **Records** sheet is protected to prevent inadvertent changes to the setup of the sheet. If you set a password for the **Records** sheet, you will be prompted to supply the password each time you generate a report or chart on the **Reports** and **Charts** sheets and the next time you open the workbook. However, you may customize the page setup. The page setup options are accessible from the Page Layout tab (Excel 2003 and earlier: File > Page Setup).

Training Tracker prevents you from adding and deleting columns within the default data area on the **Records** sheet (Columns A to S). Doing so would corrupt *Training Tracker's* click 'n' go reports and charts. You may, however, insert and delete columns in the empty data area (from Column T on) and add whatever additional data and notes you choose. When adding your own data in the empty data area, ensure that you label each column by adding a column header in Row 1. If you add data to an empty column without typing in a column header, you will receive an error message each time you attempt to generate a report or chart on the **Reports** and **Charts** sheets. If you wish to add extra data fields, such as *Employee I.D.* and *Course Code*, or set up reminder and warning flags, refer to the **Customizing Training Tracker** section of this guide on page 31 below.

To preserve the integrity of the click 'n' go reports and charts, *Training Tracker* will also prevent you from deleting the first row (header row) and from inserting rows above the header and second row on the **Records** sheet. Other than this restriction, you may insert rows at any location on the **Records** sheet.

The integrity of the click 'n' go reports and charts depend upon the absence of empty rows between data rows on the **Records** sheet. *Training Tracker* will delete any empty rows between data rows automatically as you deactivate the **Records** sheet. *Training Tracker* will alert you when empty rows are deleted.

Except for the header row, which contains the field names, you may also modify cell formats, such as font size and color, cell shading, borders, and so on. For any optional fields that you do not wish to use, you may hide the respective columns. To do this, first unprotect the sheet and then select a cell below the first row within the column that you wish to hide. Next, select the Home tab > Cells > Format > Hide & Unhide > Hide Columns (Excel 2003 and earlier: Format > Column > Hide).

If you have hidden a column on the **Records** sheet and wish to unhide it, first unprotect the sheet and select cells on either side of the hidden column, Next, select the Home tab > Cells > Format > Hide & Unhide > Unhide Columns (Excel 2003 and earlier: Format > Column > Unhide).

List Sheet

Updating Lists

The **List** sheet is where you set up your company information, ready for *Training Tracker* to present on the **Records** sheet. Setting up your company data once on the **List** sheet helps prevent data entry errors and repetitive key strokes. To find out how to set up your company data for the first time, refer to the **Pre-preparation** section of this guide on page 9 above.

Following the initial setup of the lists on the **List** sheet, the lists will require updating from time to time. For example, new employees may join the organization and new courses may be added to the training schedule. To update a list, simply unprotect the **List** sheet, add new list items to the end of the relevant list and reorder the list. The new items will appear in the in-cell dropdown list on the **Records** sheet.

To delete an item from a list, such as the name of an employee that has left the organization, simply unprotect the **List** sheet, delete the item from the relevant list and reorder the list. The deleted list item will no longer appear in the in-cell dropdown list on the **Records** sheet. Previous records containing the item will **not** be deleted and will continue to appear in historical reports and charts.

To reorder a list in either ascending or descending order, select the items in the list, select the Data tab > Sort & Filter and click on either the Sort A to Z or the Sort Z to A icon (Excel 2003 and earlier: Data > Sort). If you leave one or more blank cells between list items in any one list, items appearing below the blank cell will by default not appear in the in-cell dropdown list on the **Records** sheet. For this reason, *Training Tracker* automatically removes blank cells on exiting the **List** sheet. Sorting your lists with Excel's sort command will also automatically remove blank cells.

User Customization

The **List** sheet is protected each time you activate the sheet in order to prevent inadvertent changes to the setup of the sheet. If you set a password for the **List** sheet, you will be prompted to supply the password the next time you open the workbook. However, you may customize the page setup. The page setup options are accessible from the Page Layout tab (Excel 2003 and earlier: File > Page Setup).

Training Tracker prevents you from adding and deleting columns within the predefined lists area on the **List** sheet (Columns A to K). To preserve the integrity of the data, *Training Tracker* will also prevent you from deleting the first row (header row) and from inserting a row above the header row. Other than this restriction, you may insert rows and columns at any location on the **List** sheet.

Except for the header row, which contains the list names, you may also modify cell formats, such as font size and color, cell shading, borders, and so on. For any optional lists that you do not wish to use, you may hide the respective columns. To do this, first unprotect the sheet and then select a cell below the first row within the column that you wish to hide. Next, select the Home tab > Cells > Format > Hide & Unhide > Hide Columns (Excel 2003 and earlier: Format > Column > Hide).

If you have hidden a column on the **List** sheet and wish to unhide it, first unprotect the sheet and select cells on either side of the hidden column, Next, select the Home tab > Cells > Format > Hide & Unhide > Unhide Columns (Excel 2003 and earlier: Format > Column > Unhide).

Reports Sheet

Report Types

From the **Reports** sheet, you are able to select from a range of commonly used training reports that will satisfy the bulk of your reporting needs. The reports are designed to give you summary employee, training expenditure and training hours data. The various charts on the **Charts** sheet present the data in visual, graphical format.

Training Tracker collects information for the reports from the data you entered on the **Records** sheet. All contiguous data is used. (Contiguous data is data with no empty columns between it.) If you enter data into a contiguous column with no field name (column header), you will receive an error message each time you generate a report. Ensure that you type in a column header for each column on the **Records** sheet that contains data.

The table below lists the report types and provides an explanation of each report.

Table 4: Types of Preset Reports

<u>Manager Reports</u>

- Activity by Participant

  Displays for each training participant courses attended, course start dates, training hours and cost per course and total cost per employee. Report is sorted alphabetically by participant name and may be filtered by year, department and group.

- Activity by Group

  Displays for each training participant courses attended, course start dates, training hours per course and total hours per employee. Report is sorted alphabetically by group and may be filtered by year, department and role.

- Activity by Role

  Displays for each training participant courses attended, course start dates, training hours per course and total hours per employee. Report is sorted alphabetically by role and may be filtered by year, department and group.

<u>Expenditure Reports</u>

- Expenditure by Department

  Displays for each department training expenditure per month for one or more calendar years, total cost per month and total cost per department. Report may be filtered by year.

- Expenditure by Group

  Displays for each group training expenditure per month for one or more calendar years, total cost per month and total cost per group. Report may be filtered by year and department.

- Expenditure by Provider

  Displays for each training provider training expenditure per month for one or more calendar years, total cost per month and total cost per provider. Report may be filtered by year.

- Expenditure by Purchase Status

  Displays for each purchase status type training expenditure per month for one or more calendar years, total cost per month and total cost per status type. Report may be filtered by year.

<u>Hours Reports</u>

- Hours by Department

  Displays for each department training hours per month for one or more calendar years, total hours per month and total hours per department. Report may be filtered by year.

- Hours by Group

  Displays for each group training hours per month for one or more calendar years, total hours per month and total hours per group. Report may be filtered by year and department.

- Hours by Trainer

  Displays for each trainer training hours per month for one or more calendar years, total hours per month and total hours per trainer. Report may be filtered by year.

- Hours by Training Provider

  Displays for each training provider training hours per month for one or more calendar years, total hours per month and total hours per training provider. Report may be filtered by year.

- Hours by Training Outcome

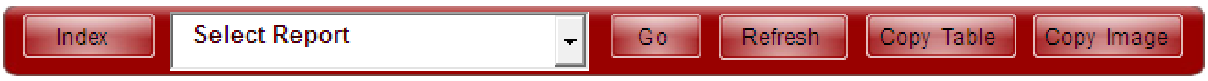
  Displays for each training outcome type training hours per month for one or more calendar years, total hours per month and total hours per training outcome type. Report may be filtered by year.

- Hours by Training Results

  Displays for each training result type training hours per month for one or more calendar years, total hours per month and total hours per training result type. Report may be filtered by year.

To see various examples of completed reports, review the sample administration file. If you wish to have included one or more additional report types in the set of click ‘n’ go reports, contact Business Performance Pty Ltd to request a quotation.

Viewing and Copying Reports



To view a report, simply select the report you wish to see from the selector bar located at the top of the **Reports** sheet and click the Go button. If you have added, deleted or edited records on the **Records** sheet, update the report by clicking the Refresh button. To view another report, select it from the selector bar and click the Go button. If the report becomes corrupted for any reason, select it again from the selector bar and click the Go button. The report will then be regenerated. Click the Index button to return to the **Index** sheet to see a summary of available charts. If you have entered data outside of the default data area on the **Records** sheet without typing in a column header in

Row 1, you will be prompted to type in a column header when you click the Go button. The default data area on the **Records** sheet is all the cells residing in Columns A to S.

The filter section at the top of the generated report allows you to select a subset of the data that you wish to display. If your data spans more than one calendar year, select the year that you wish to display by selecting the year from the *Year* dropdown list.

Most reports are summarized into monthly reporting periods. The particular month to which a reporting item is allocated is determined by the item’s associated training event start date. So, for example, if a training event started on 4 March and ended on 8 April, the expenditure and hours for that event is allocated to the month of March.

Training Activity by Participant

Year	2009
Department	Production
Group	Assembly Blue Team

Sum of Cost				
Participant Name	**Course**	**Start Date**	**Hours**	**Total**
⊟Arthur Boo	⊟Effective Communication	⊟06-Jun-2009	6.00	$570.00
	⊟How to Read Work Packages	⊟26-Feb-2009	2.00	$0.00
	⊟Manual Handling	⊟28-Feb-2009	3.00	$0.00
	⊟Safety in the Workplace	⊟10-Feb-2009	1.50	$0.00
		⊟08-May-2009	1.50	$0.00
Arthur Boo Total				$570.00
⊟Binx Bolling	⊟Component Identification	⊟11-Mar-2009	2.00	$0.00
	⊟Component Mounting	⊟20-Mar-2009	3.00	$0.00
	⊟How to Read Work Packages	⊟19-Feb-2009	2.00	$0.00
	⊟Machine Cleaning	⊟06-Mar-2009	1.00	$0.00
	⊟Safety in the Workplace	⊟21-Feb-2009	1.50	$0.00
Binx Bolling Total				$0.00
⊟Charles Foster	⊟Safety in the Workplace	⊟21-Feb-2009	1.50	$0.00
Charles Foster Total				$0.00
⊟Cosimo Piovasco	⊟Component Identification	⊟04-Mar-2009	2.00	$0.00
	⊟Component Mounting	⊟20-Mar-2009	3.00	$0.00
	⊟How to Read Work Packages	⊟19-Feb-2009	2.00	$0.00

To produce a report for a particular department manager, supervisor or project manager, select and display one of the Manager Reports; *Activity by Participant*, *Activity by Group* or *Activity by Role*.

For example, you want to display a department manager's report. In that case, generate the *Activity by Participant* report from the selector bar and click the Go button. Select the manager’s department from the *Department* dropdown list and leave *Group* as (All). This will display the data for one department and all of the groups below it. To produce a report for one supervisor/team leader of a group, select the department to which the group belongs as above and then select the group that you wish to display using the *Group* dropdown list. If you have not set up *Groups* on the **List** sheet, no groups will be displayed.

To hide items, such as particular months or groups, click on the down arrow next to the field name for which you want to hide items. Then, select the check box for each item that you want to show, and clear the check box for each item that you want to hide.

Clicking either the Copy Table or Copy Image button located in the selector bar copies the currently displayed report to the Windows Clipboard. Once copied to the Clipboard, you can paste the report into another sheet in the same Excel workbook, another Excel workbook or into another application.

To copy the report as a formatted table into a word processor, such as Microsoft Word, use the Copy Table button. To copy the report as a picture into a program that accepts graphics, such as Microsoft Paint, use the Copy Table or Copy Image buttons.

Previewing and Printing Reports

To preview the report prior to printing, click the Microsoft Office Button > Print > Print Preview (Excel 2003 and earlier: File > Print Preview). The preview and print areas are preset to print on one page width and will accommodate automatically to the last entries in each report. Page headers and footers are also preset, ready for printing. Once in the Print Preview screen, simply set the print options for your particular printer and print media and click on the Print button.

User Customization

The **Reports** sheet is protected to prevent inadvertent changes to the setup of the sheet. If you set a password for the **Reports** sheet, you will be prompted to supply the password each time you select the sheet and each time you open the workbook. If you set a password for protecting the **Records** sheet, you will be prompted to supply the password each time you generate a report. However, you may customize the page setup of the **Reports** sheet. The page setup options are accessible from the Page Layout tab (Excel 2003 and earlier: File > Page Setup).

Training Tracker creates each report as an Excel PivotTable. If you are familiar with Excel's PivotTables feature, you may comfortably modify the design of a report. For example, the *Activity by Participant* report is sorted first by participant name in alphabetical order, then by course name in alphabetical order. You may vary the sort order by modifying the field settings sort option. To do this, click on the down arrow next to the field name for which you want to perform a sort and select your preferred sort order (Excel 2003 and earlier: PivotTable toolbar > Field Settings > Advanced).

If you have added additional fields to the **Records** sheet, you may incorporate the new data into the preset reports. For this, you will need to manually edit the design of the PivotTable report. Refer to Excel's Help feature for instructions on how to edit the PivotTable design. Changes to a report will be preserved as you enter new data on the **Records** sheet and refresh the report with the Refresh button. However, design changes will be lost once you regenerate the report or select a new report with the Go button. You may also create your own PivotTable reports on a new sheet using the data you enter on the **Records** sheet. If you modify the design of an existing report or create a new report, ensure that you create a backup copy of your workbook prior to editing. If the report does not turn out as you expect, you can then reinstate your previous version.

We invite you to contact Business Performance Pty Ltd for a quotation if you would like us to customize reports to your exact requirements.

Charts Sheet

Chart Types

From the **Charts** sheet, you are able to select from a range of smartly presented training graphs that will satisfy the majority of your charting needs. The charts are designed to give you summary training expenditure and training hours data. The table positioned above each chart presents the numerical data depicted in the chart. The various reports on the **Reports** sheet give a more detailed account of the tabular data.

Training Tracker collects information for the charts from the data you entered on the **Records** sheet. All contiguous data is used. (Contiguous data is data with no empty columns between it.) If you enter data into a contiguous column with no field name (column header), you will receive an error message each time you generate a chart. Ensure that you type in a column header for each column on the **Records** sheet that contains data.

The table below lists the chart types and provides an explanation of each chart.

Table 5: Types of Preset Charts

Expenditure Charts

- Expenditure by Department

  Displays a bar chart showing training expenditure for each department for one or more calendar years. Chart may be filtered by year.

- Expenditure by Group

  Displays a bar chart showing training expenditure for each group for one or more calendar years. Chart may be filtered by year and department.

- Expenditure by Provider

  Displays a bar chart showing training expenditure for each training provider for one or more calendar years. Chart may be filtered by year.

Hours Charts

- Hours by Department

  Displays a bar chart showing training hours for each department for one or more calendar years. Chart may be filtered by year.

- Hours by Group

  Displays a bar chart showing training hours for each group for one or more calendar years. Chart may be filtered by year and department.

- Hours by Trainer

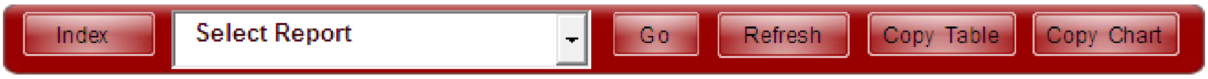
  Displays a bar chart showing training hours for each trainer for one or more calendar years. Chart may be filtered by year.

- Hours by Training Provider

  Displays a bar chart showing training hours for each training provider for one or more calendar years. Chart may be filtered by year.

To see various examples of populated charts, review the sample administration file. If you wish to have included one or more additional chart types in the set of click 'n' go charts, contact Business Performance Pty Ltd to request a quotation.

Viewing and Copying Charts



To view a chart, simply select the chart you wish to see from the selector bar located at the top of the **Charts** sheet and click the Go button. If you have added, deleted or edited records on the **Records** sheet, update the chart by clicking the Refresh button. To view another chart, select it from the selector bar and click the Go button. If the chart becomes corrupted for any reason, select it again from the selector bar and click the Go button. The chart will then be regenerated. Click the Index button to return to the **Index** sheet to see a summary of available charts. If you have entered data outside of the default data area on the **Records** sheet without typing in a column header in Row 1, you will be prompted to type in a column header when you click the Go button. The default data area on the **Records** sheet is all the cells residing in Columns A to S.

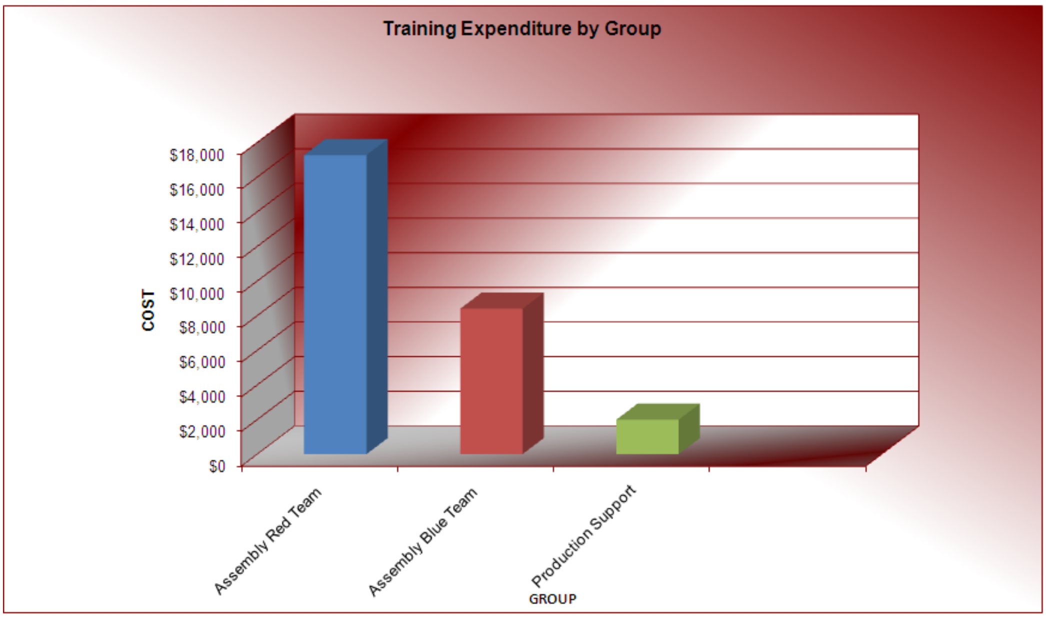
The filter section at the top of the table located above the generated chart allows you to select a subset of the data that you wish to display. If your data spans more than one calendar year, select the year that you wish to display by selecting the year from the *Year* dropdown list.

To produce a training expenditure or training hours chart for a particular department manager, select and display the *Expenditure by Group* or *Hours by Group* chart from the selector bar and click the Go button. In the table above the chart, select the manager's department from the *Department* dropdown list. This will display the data for one department and all of the groups below it. If you have not set up *Groups* on the **List** sheet, no groups will be displayed.

Training Expenditure by Group

Year	(All)
Department	Production

Sum of Cost	Group		
	Assembly Red Team	Assembly Blue Team	Production Support
Total	$17,270.00	$8,395.00	$1,985.00



To hide items in the chart, such as particular departments, groups or trainers, in the table above the chart, click on the down arrow next to the field name for which you want to hide items. Then, select the check box for each item that you want to show, and clear the check box for each item that you want to hide.

Clicking either the Copy Table or Copy Chart button located in the selector bar copies the currently displayed table or chart to the Windows Clipboard. Once copied to the Clipboard, you can paste the table into another sheet in the same Excel workbook or into another application, such as Microsoft Word. Using the Copy Chart button, you can paste the chart as a picture into another sheet in the same Excel workbook, another Excel workbook or into another application.

Previewing and Printing Charts

To preview the chart prior to printing, click the Microsoft Office Button > Print > Print Preview (Excel 2003 and earlier: File > Print Preview). The preview and print areas are preset to print the chart and its associated table on one page in landscape orientation. Page headers and footers are also preset, ready for printing. Once in the Print Preview screen, simply set the print options for your particular printer and print media and click on the Print button.

To print a chart sized to fill one page, first unprotect the **Charts** sheet. With your mouse, select the chart and then click the Microsoft Office Button > Print > Print Preview (Excel 2003 and earlier: File > Print Preview) to preview the chart prior to printing. In the Print Preview screen, click the Page Setup button if you wish to change the page setup (Excel 2003 and earlier: Setup) and then click on the Print button to print the selected chart.

User Customization

The **Charts** sheet is protected to prevent inadvertent changes to the setup of the sheet. If you set a password for the **Charts** sheet, you will be prompted to supply the password each time you select the sheet and each time you open the workbook. If you set a password for protecting the **Records** sheet, you will be prompted to supply the password each time you generate a chart. However, you may customize the page setup of the **Charts** sheet. The page setup options are accessible from the Page Layout tab (Excel 2003 and earlier: File > Page Setup).

Training Tracker creates each chart as an Excel PivotChart based on the PivotTable located above the chart. If you are familiar with Excel's PivotTables and PivotCharts feature, you may comfortably modify the design of a chart. You may, for example, resize or move the legend, add a header and footer, alter the format of the Chart and Axis titles or change the color scheme. Consult Excel's Help to find out more about chart formatting. If you are not very experienced with Excel's charting feature, we recommend that you do not modify the design of the existing charts. We encourage you to design and construct new charts on an existing chart sheet or on a new sheet.

If you have added additional fields to the **Records** sheet, you may incorporate the new data into the preset charts. For this, you will need to manually edit the design of the PivotTable located above the chart. Refer to Excel's Help feature for instructions on how to edit the PivotTable design. Changes to a chart will be preserved as you enter new data on the **Records** sheet and refresh the chart with the Refresh button. However, design changes will be lost once you regenerate the chart or select a new chart with the Go button. You may also create your own charts on a new sheet using the data you enter on the **Records** sheet. If you modify the design of an existing chart or create a new chart, ensure that you create a backup copy of your workbook prior to editing. If the chart does not turn out as you expect, you can then reinstate your previous version.

We invite you to contact Business Performance Pty Ltd for a quotation if you would like us to customize charts to your exact requirements.

Help Sheet

Updating Instructions

The **Help** sheet is where you documented your company's business rules and instructions for your database administrator. If you have not already done so, refer to the **Setup Help Sheet** section of this guide on page 14 above.

Following the initial setup of the **Help** sheet, the instructions contained there will not require updating often. However, from time to time, you may need to make minor changes. For example, you may need to employ a new database administrator or you may change the number of hours in a standard day. To make your updates, simply unprotect the **Help** sheet and edit the cells as required.

User Customization

The **Help** sheet is protected each time you activate the sheet in order to prevent inadvertent changes to the setup of the sheet. You may set a password for the **Help** sheet if you wish to prevent unauthorized changes to the sheet. In addition, you may modify the format of the sheet cells, such as cell shading, font size and color, and customize the page setup. The page setup options are accessible from the Page Layout tab (Excel 2003 and earlier: File > Page Setup).

The company name you enter in the *Company Name* field will automatically appear on the **Index** sheet, under the *Training Tracker Index* title located at the top of the sheet. The *Company Name* and *Records Owner* fields are also exported and imported whenever you use *Training Tracker's* export and import functions. See page 37 below for more information on migrating your data.

Network Access

Your *Training Tracker* workbook may be accessed by two or more people using different computers. For multi-user access, place the *Training Tracker* workbook on a network drive that is accessible by other users. If a user attempts to open a workbook that is already in use by another user, they will receive a message indicating that the workbook is open and asking whether the user wishes to open the file as read-only.

Multi-user License Terms

Before placing *Training Tracker* on a networked drive or allowing multi-user access, carefully check your *Training Tracker* License Agreement to ensure that you have purchased the requisite number of licenses for your use.

For Excel 2000 to 2003 users, the Share Workbook and Protect and Share Workbook menu items are disabled. Excel's workbook sharing feature allows two or more users to edit the same workbook simultaneously.

For Excel 2007 and later users, avoid selecting the Share Workbook and the Protect and Share Workbook menu options. Attempting to use the workbook sharing feature with *Training Tracker* in Excel 2007 and later versions will result in errors.

8. Customizing Training Tracker

Adding Sheets, Reports and Charts

In order to maintain the integrity of the click 'n' go reports and charts, you are prevented from changing the name of existing sheets. If you attempt to change the name of a sheet, the name will revert to the original when you select another sheet.

However, you may add one or more sheets to your workbook at anytime. To add a sheet, select the Home tab > Cells > Insert > Insert Sheet (Excel 2003 and earlier: Insert > Worksheet). A new worksheet will be inserted to the left of the currently selected sheet. Once you have created a new sheet, there is no restriction on the reports and charts that you may design.

You may create PivotTable reports on the new sheet that adjust the data range automatically as you add new records to the **Records** sheet. To do this, base your new PivotTable report on the range named *PivotRange*. This range has already been set up for your use. To update your PivotTable report, right-click anywhere inside your new PivotTable report and click on the Refresh option on the context sensitive menu (Excel 2003 and earlier: Refresh Data). Any new charts you base on a PivotTable report set up this way will update automatically as you refresh the associated PivotTable report.

If you would like Business Performance Pty Ltd to create a customized report or chart to your requirements, we invite you to contact us for a quotation. The following section illustrates how you may add additional data fields and specialized reports to *Training Tracker*.

Adding Additional Data Fields

With *Training Tracker*, you are able to add additional fields on the **List** sheet for use on the **Records** sheet. For example, your organization may allocate a unique employee identifier to each employee, such as an *Employee Number* or *Employee I.D.* To set up *Training Tracker* to associate each unique identifier with the respective employee, follow these steps.

1. In Row 1 of Column L (Cell L1) on the **List** sheet, enter the preferred name of your list (e.g., Employee No.)
2. Starting at Cell L2 and working down the column, enter each employee's unique identifier.
3. In Row 1 of Column T (Cell T1) on the **Records** sheet, enter the same field name that you entered on the **List** sheet in *Step 1* above.
4. Use Excel's vlookup function to enter a vlookup formula in Cell T2 on the **Records** sheet. The formula will look like:

   ```
   =VLOOKUP(A2,List!$A$2:$L$500,12,FALSE)
   ```
5. Change the number `500` in the formula to the row number of the last employee name row on the **List** sheet. For example, if there are 900 employees listed on the **List** sheet, enter the number `901` in the vlookup formula. (You can increase the size of this number to give you some spare capacity as you add new employees to the **List** sheet.)
6. Copy the formula down to all used rows on the **Records** sheet (select cells, Ctrl+D).

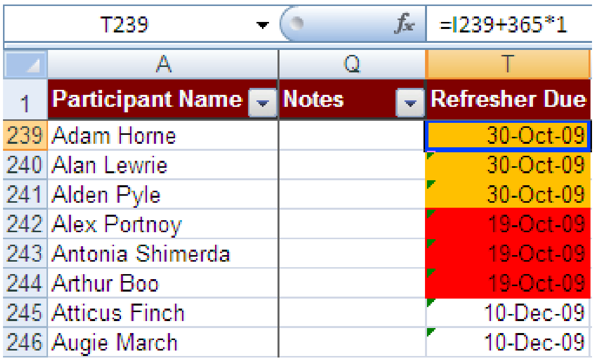
Each employee's identifier will now appear automatically in Column T of the **Records** sheet as you enter new records.

You can follow the same steps given above to ascribe and track each training participant's *Registration Number*, or any other kind of unique identifier that you may wish to allocate to people. The same method is also suitable for assigning and tracking training course identifiers, such as *Course I.D.* or *Course Code*.

Adding Reminder and Warning Flags

Setting Flags on the Records Sheet

Training Tracker can be customized to suit your organization's requirements using Excel's extensive calculation and formatting capabilities. For example, many managers require notification that an employee is due for training in a particular subject. With compliance type training, for example, the administrator is able to set a reminder or a warning that an employee is due for refresher training in a given area.


T239 =I239+365*1

	A	Q	T
1	Participant Name	Notes	Refresher Due
239	Adam Horne		30-Oct-09
240	Alan Lewrie		30-Oct-09
241	Alden Pyle		30-Oct-09
242	Alex Portnoy		19-Oct-09
243	Antonia Shimerda		19-Oct-09
244	Arthur Boo		19-Oct-09
245	Atticus Finch		10-Dec-09
246	Augie March		10-Dec-09

The examples in this section illustrate how you can customize *Training Tracker* to deliver such reminders and warnings. In the example below, a warning flag is set to warn the administrator that training is due to be started within 7 days. A further reminder flag is then set to display a reminder when training is due within 30 days. The setup process is in two parts:

A. Set the refresher training due date for each employee/course.

B. Set the flag parameters and formats.

A. Set the refresher training due date for each employee/course.

This step enters a fixed date or a calculated date for each refresher training due date.

1. Unprotect the **Records** sheet.
2. On the **Records** sheet, in Column T add the field name *Refresher Due* in the header row.
3. For each Participant Name/Course for which there exists a refresher training due date, enter that date in the adjacent *Refresher Due* column. Either enter the date manually, for example, as 3-Mar-11, or enter a formula that calculates the due date. For example, if the refresher course is due to be started three years from the *End Date* listed in Column I, then enter the formula:

   ```
   =I2+365*3
   ```

   Replace "2" in the formula with the row number of the entry you are setting. Replace "3" in the formula with the number of years.
4. If you have a number of entries for which the refresher date is the same or based on the same formula, enter the formula once and then copy the formula down to the remaining cells in Column T.
5. If you enter formulae, check that each cell displays the correct refresher training due date.

B. Set the flag parameters and formats.

This step sets conditional formats for the flags for each refresher training due date.

6. Select the first cell in the *Refresher Due* column that requires a warning flag.
7. Select the Home tab > Styles > Conditional Formatting > New Rule (Excel 2003 and earlier: Format > Conditional Formatting).
8. Select *Use a formula to determine which cells to format* from the list of rule types (Excel 2003 and earlier: Condition 1 > Formula Is).
9. In the Rule Description box, enter the formula:

```
=IF(ISBLANK(T2),"",T2-TODAY()<7)
```

    Replace "2" in the formula with the row number of the entry you are setting.
    Replace "7" in the formula with the number of days in the warning period.

10. Click the Format button.
11. Set your preferred flag format (for example, a red fill color) and click the OK button and click the OK button again.
12. Select the cell and the cells below for which you want to set the same refresher training due date formula and warning flag.
13. Copy cell contents and formatting to the cells below (Ctrl + D).
14. Repeat the above steps for each course for which you wish to set a warning.

So far in this example, we have set a red colored warning flag to show in the *Refresher Due* column 7 days before the refresher training is due.

In addition, you may wish to set a second flag to display an orange colored reminder 30 days before the refresher training is due. To do this, follow these additional steps:

15. Select the first cell in the *Refresher Due* column that requires a reminder flag.
16. Select the Home tab > Styles > Conditional Formatting > Manage Rules (Excel 2003 and earlier: Format > Conditional Formatting).
17. Click the New Rule button (Excel 2003 and earlier: Add button).
18. Select *Use a formula to determine which cells to format* from the list of rule types (Excel 2003 and earlier: Condition 2 > Formula Is).
19. In the Rule Description box, enter the formula:

```
=IF(ISBLANK(T2),"",T2-TODAY()<30)
```

    Replace "2" in the formula with the row number of the entry you are setting.
    Replace "30" in the formula with the number of days in the reminder period.

20. Click the Format button.
21. Set your preferred flag format (for example, an orange fill color) and click the OK button.
22. Use the Move Up button to move the first rule (warning) above the second rule (reminder) (Excel 2007 and later only) and click the OK button.
23. Select the cell and the cells below for which you want to set the same refresher training due date formula and reminder flag.
24. Copy cell contents and formatting to the cells below (Ctrl + D).
25. Repeat the above steps for each course for which you wish to set a reminder.

With the above settings, whenever the current date is less than 30 days before the refresher training is due, the cell will turn an orange color. When the current date draws down to less than 7 days prior to when the refresher training is due, the cell will change to a red color. To set different reminder/warning periods or flag colors, simply edit the conditional format settings. The screen shot shown on page 32 above shows how the reminder and warning flags will appear in *Training Tracker* with the above settings.

Adding a Countdown Timer to the Records Sheet

With *Training Tracker*, you can easily set up a field that displays the number of days till each employee's refresher training is due or how many days it is overdue. To set up such a countdown timer, simply add a *Days Due* field next to the *Refresher Due* field set up in the previous example. On the **Records** sheet, in Column U add the field name *Days Due* in the header row. In Cell U2, enter the formula:

```
=IF(ISERROR(T2-TODAY()),"",IF(ISBLANK(T2),"",T2-TODAY()))
```

Copy the formula down to all data rows below for which you wish to monitor refresher training status. The result shown in this column is a count of the number of days before the refresher training is due. A negative number indicates that attendance is overdue. If the cell in the adjacent *Refresher Due* column is blank, the *Days Due* field will also show as a blank.

If you want to show only days below a certain number, then include an extra conditional in the cell formula. For example, to show a result only where the number of days is less than 30, include the following formula:

```
=IF(ISERROR(T2-TODAY()),"",IF(ISBLANK(T2),"",IF((T2-
TODAY()<30),T2-TODAY(),"")))
```

The screen shot below illustrates results for the settings given above.

U239 =IF(ISERROR(T239-TODAY()),"",IF(ISBLANK(T239),"",T239-TODAY()))

	A	Q	T	U	V	W	X
1	Participant Name	Notes	Refresher Due	Days Due			
239	Adam Horne		30-Oct-09	15			
240	Alan Lewrie		30-Oct-09	15			
241	Alden Pyle		30-Oct-09	15			
242	Alex Portnoy		19-Oct-09	4			
243	Antonia Shimerda		19-Oct-09	4			
244	Arthur Boo		19-Oct-09	4			
245	Atticus Finch		10-Dec-09	56			
246	Augie March		10-Dec-09	56			

Creating a Refresher Training Report

Once you have set up the countdown timer formulae specified in the previous section, you are then able to create a custom refresher training report that matches your organization's exact needs. The example below shows how you can create a report that lists employees that are due or overdue for refresher training. To create a refresher training report, follow these steps.

1. Insert a new blank worksheet and name it *Refresher*.
2. On the new worksheet, select Cell B8.
3. Select the Insert tab > Tables > PivotTable (Excel 2003 and earlier: Data > PivotTable and PivotChart Report > PivotTable).
4. In the Table/Range box, type:

   ```
   =PivotRange
   ```

5. Click the OK button.
6. Drag the *Year*, *Department* and *Group* fields to the Report Filter area (Excel 2003 and earlier: drag to Page Fields area).
7. Drag the *Participant Name*, *Course* and *Days Due* fields to the Row Labels area (Excel 2003 and earlier: drag to Row Fields area).
8. The refresher training report will appear with the above chosen fields.
9. To hide training courses with no value displayed, uncheck (blank) under the *Days Due* filter.
10. Format the report to your preferences.

The screen shot below illustrates a refresher training report using the above parameters. To find out more about designing PivotTable reports, search on “pivottable” in Excel’s Help.

Refresher Training - Days Due Report

Year	(All)
Department	(All)
Group	(All)

Participant Name	Course	Days Due
Adam Horne	Safety in the Workplace	15
Alan Lewrie	Safety in the Workplace	15
Alden Pyle	Safety in the Workplace	15
Alex Portnoy	Safety in the Workplace	4
Antonia Shimerda	Safety in the Workplace	4
Arthur Boo	Manual Handling	12
	Safety in the Workplace	4
Atticus Finch	Safety in the Workplace	56
Augie March	Safety in the Workplace	56
Aureliano Buendia	Manual Handling	3
Eugene Henderson	Manual Handling	12
Fergus Kilburnie	Manual Handling	12
Harry Potter	Manual Handling	12
Holden Caulfield	Manual Handling	34
Janie Crawford	Manual Handling	34
Jason Bridge	Manual Handling	34
Jay Gatsby	Manual Handling	34
Kimball O'Hara	Manual Handling	12
Marcel Remembranc	Manual Handling	12
Neddy Merrill	Manual Handling	34
Peter Pan	Manual Handling	34
Scout Finch	Manual Handling	12
Stephen Dedalus	Manual Handling	34

The examples above illustrate how you can track and report on refresher training attendance. Use these same Excel features to create any kind of tracking and reporting scenario. (Note that formulae entered on the **Records** sheet are not exported or imported during data migration. During the data import and export process, formulae are converted to values. For more information on data migration, see page 37 below.)

Business Performance Pty Ltd can assist you in implementing the examples shown above. We would also be pleased to create a customized tracking report meeting your exact needs. We invite you to contact us for a quotation.

9. Managing Administration Files

Saving and Backing Up Your Administration Files

There is more than one way to back up your training administration file. Here we will describe but one method that has worked well for us. As a professional, we do not need to emphasize to you the importance of backing up your files. The experts and hard experience repeatedly tell us: “It is not a question of *if* my files will become lost or corrupted, but *when*”. The method described here not only serves the purpose of creating backups. In addition, it provides a measure of data and report archiving.

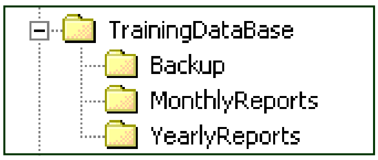
Firstly, create an administration directory with the name `TrainingDataBase` or similar. Create two new directories under this directory named `MonthlyReports` and `YearlyReports`. These will serve as the repository for your regular finished workbooks.

Our sample database started life in July 2008, so we named our initial administration file `TraindBJul2008.xls`. At the end of the month of July and after we had audited and cleaned up the data, we saved a copy of our file in the `MonthlyReports` subdirectory, leaving the original in the `TrainingDataBase` directory. We then renamed the original file `TraindBAug2008.xls`, ready for it to accept new data for the month of August. At the end of August, we simply repeated the procedure, saving a copy of the file to the `MonthlyReports` subdirectory as `TraindBAug2008.xls` and renaming the original file as `TraindBSep2008.xls`. Note that the data in the original file accumulates as the months progress.

If your reporting period is weekly in addition to, or as opposed to, monthly, create a subdirectory under the `TrainingDataBase` directory named `WeeklyReports`. Simply follow the above procedure weekly, adding your weekly workbook files to this subdirectory.

At the end of the calendar year, we saved a copy of the file in the `MonthlyReports` subdirectory, as before. We also saved a copy of the file in the `YearlyReports` subdirectory as `TraindBFY2008.xls`. If your financial year encompasses the period July to June and you wish to align your training reporting period with the financial reporting period, you may name the file `TraindBFY2009.xls`, for example.

If you have made substantial changes to your administration file since your last backup and it will be a while before you finalize and save your next regular backup, you may want to create an intermediate backup of your file. To do this, create a directory named `Backup` under your main administration directory. Copy your administration file to this directory. Be careful not to *move* your file inadvertently. Rename the file in the `Backup` directory by placing the characters `Bkup1` at the end of the file name. For example, the file `TraindBAug2008.xls` is renamed to `TraindBAug2008Bkup1.xls`. The next time you want to create an intermediate backup, repeat the above process. However, this time place `Bkup2` at the end of the filename, and so on for succeeding backups. When you have finished, your directory structure should look something like the structure pictured on the right.



You now have a history of your training administration data and reports and a handy set of backup files. **This process is not meant to replace your Information Systems department’s backup processes.** To begin with, the backups you create are neither stored off-site nor on a separate backup medium. They do, however, provide a readily retrievable set of files in case something goes wrong.

Starting a New Administration File

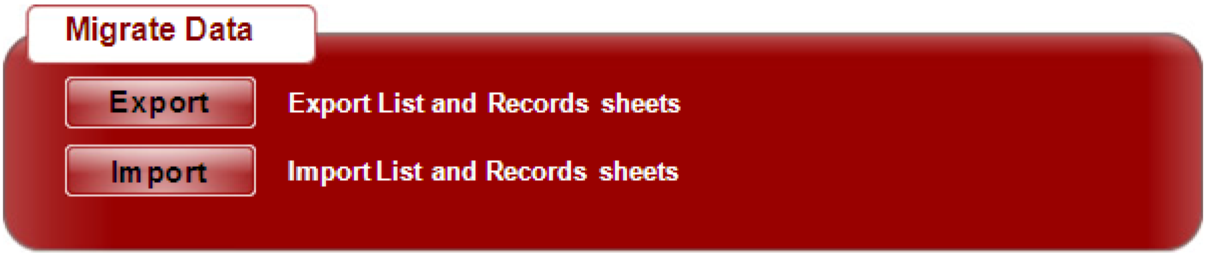
As time progresses, the size of your administration file will grow. How large should you allow it to get before starting a new file? The answer to this question will depend on a number of factors. Of course, the higher the level of training activity in your organization, the faster the file size will grow. Other limiting factors include the level of instability in your computer system, your processor speed and the amount of memory you have installed.

A sign that you are reaching the limit of your system's capacity is that Microsoft Excel begins behaving unpredictably. For example, in-cell dropdown lists may not appear when you click on a cell on the **Records** sheet. When this happens, consider starting a new file at the beginning of a financial or calendar year.

When you are ready to start a new file, avoid performing setup tasks from the beginning by simply deleting all records on the **Records** sheet. Make sure you create a backup copy of your existing file first. You will then be ready to begin a new year with a blank **Records** sheet and with your configuration information saved from the previous year.

Exporting and Importing Data

Data Migration Overview



Training Tracker Version 2.0 now allows you to migrate data to and from other sources. With the Export function, you can export your *Training Tracker* data to another blank Excel workbook. Using the Import function, you can import your *Training Tracker* data from a variety of other sources. The Data Migration facility gives *Training Tracker* maximum compatibility with your other applications. With it, you can:

- recover from a corrupted workbook
- export data for analysis in another program
- convert and archive your data in a non-Excel format
- import data from an earlier version of Training Tracker
- import setup data from a Human Resource Information System (HRIS)

The data migration facility makes it easy to upgrade your version of *Training Tracker* without losing your previous data. Access the Data Migration facility from the **Index** sheet. Use the Export and Import buttons on that sheet to begin the export and import process. You will be guided by a series of prompts until the process is completed.

Exporting Data

Training Tracker's data export facility copies data from the currently open *Training Tracker* workbook to a new Excel workbook. The data copied includes all contiguous data on the **Records** and **List** sheets and the *Company Name* and *Records Owner* entered at the top of the **Help** sheet. (Contiguous data is data with no empty columns between it.) If you want to export data outside of *Training Tracker's* default data areas on the **Records** and **List** sheets, ensure that there are no empty columns between it and the default data areas. The default data area on the **Records** sheet is all the cells residing in Columns A to S. The default data area on the **List** sheet is all the cells residing in Columns A to K. If you need to export data beyond an empty column, either type in a temporary field name in the first row of the empty column or copy and paste the data manually into another workbook or application. Note that during the export process, formulae and cell formats are not exported. Values only are exported. If you have entered formulae or conditional formats on the **Records** or **List** sheets that you wish to export, you will need to replicate these in the newly created export file.

To export your data to a new Excel workbook, follow these steps:

1. Open the workbook from which you wish to export your data.
2. Select the **Index** sheet and click the Export button.
3. Specify the location and the name of the file you wish to export to.
   a) The default export file name is `Export_`*`mm-dd-yy_original file name`*`.xlsx`
   b) Excel 2003 and earlier versions of Excel will save the export file in xls format.
   c) Any file with the same name in the same location will be overwritten without warning.
4. Click the Save button.
5. On the Operation Complete dialog box, click the OK button.

The newly created export file containing your data includes three sheets, named **Records**, **List** and **Help**. Your data is now ready for importing into an empty *Training Tracker* workbook using the instructions in the section following.

Importing Data

The data import facility copies data from another Excel workbook to the currently open *Training Tracker* workbook. Data may be imported from these sources:

- a Training Tracker workbook Version 2.0 or earlier
- an Excel workbook prepared with the same sheet and field names as Training Tracker
- the special import template named ImportTemplate.xls

In many cases, data may be successfully imported from a corrupted *Training Tracker* workbook. The workbook can be a current version or an earlier version of *Training Tracker*. Later versions of Excel (Excel 2002(XP) and later) are much better at handling and importing from corrupted workbooks.

As well as recovering data from corrupted workbooks, the import facility is also useful for importing company setup data from another database, such as your company's Human Resource Information System (HRIS). Data to be imported can include employee names, job roles, organization structure, and so on. To import your company data successfully, you will first need to prepare the data for import. Preparation involves setting up a new workbook with the correct sheet names and field names. To make your job easier, we have included with *Training Tracker* a specially prepared import template. You can find the template in the same directory in which you extracted your *Training Tracker* files on installation. The import template is named `ImportTemplate.xls` and is already set up with the correct sheet and field names.

To use the import template, export your data from your Human Resource Information System (HRIS) as either an Excel file (xls, xlsx), tab delimited text file (txt) or a comma separated values file (csv). Open your text or csv file in a new Excel workbook and copy the columns of data to the respective fields on the **List** sheet in the import template. Save the file with a different name. Your company data is now ready for importing into *Training Tracker*.

When importing from an existing *Training Tracker* workbook, the data copied includes all contiguous data on the **Records** and **List** sheets and the *Company Name* and *Records Owner* entered at the top of the **Help** sheet. (Contiguous data is data with no empty columns between it.) If you want to import data outside of *Training Tracker's* default data areas on the **Records** and **List** sheets, ensure that there are no empty columns between it and the default data areas. The default data area on the **Records** sheet is all the cells residing in Columns A to S. The default data area on the **List** sheet is all the cells residing in Columns A to K. If you need to import data beyond an empty column, either type in a temporary field name in the first row of the empty column or copy and paste the data manually into your current *Training Tracker* workbook. Note that during the import process, formulae and cell formats are not imported. Values only are imported. If you have entered formulae or conditional formats on the **Records** or **List** sheets, you will need to replicate these in your current *Training Tracker* workbook.

To import data into your *Training Tracker* workbook, follow these steps:

1. Open a *Training Tracker* workbook empty of data.
2. Select the **Index** sheet and click the Import button.
3. Select the file from which you wish to import.
4. Click the Open button.
   a) If the import file is already open, confirm that is the file from which you wish to import.
   b) If the **List** sheet contains data, the import process will exit.
   c) All data on the **Records** sheet will be overwritten without warning.
5. On the Operation Complete dialog box, click the OK button.
6. Save your *Training Tracker* workbook.

If the import file is corrupted, try the following:

- open the corrupted file before starting the import process
- use a later version of Excel (Excel 2002(XP) or later).

Please note that there is no guarantee that the data residing in a corrupted workbook can be retrieved. After importing data from a corrupted workbook, visually confirm that the data imported is a faithful copy of the original data.

10.Frequently Asked Questions (FAQ)

We have compiled a list of the most commonly asked questions. If you cannot find your question here, try looking up the index to this guide and searching the FAQ section of our web site. If you still cannot find the answer to your question, drop us a line. Our contact details are in the **How to Contact Us** section of this guide.

Installation Problems

Q. ***I'm having trouble downloading your software.***

A. First, check that when you received the prompt to either open or save the file to your computer, you chose the Save option and not the Open option. Also check your browser's security settings. A high security setting may be blocking some types of downloads. Next, some company firewalls and anti-virus programs block some types of downloads. Contact your network administrator for assistance. You can also try downloading from another PC.

Q. ***I downloaded the zip file. What do I do with it?***

A. You will need to extract the compressed files contained within the zip file to a folder on your computer. Create a new folder on your hard drive and right-click on the zip file. Select the option to extract the files and extract to the folder you created. Each extracted file can now be opened with the program that created it. For example, double-clicking on a pdf file will open Adobe Acrobat reader, double-clicking on a doc file will open Microsoft Word, whilst double-clicking on an xls file will open Microsoft Excel.

Q. ***I accidentally selected the* Disable Macros *button and now I can't do anything.***

A. Simply close the *Training Tracker* workbook by clicking the Microsoft Office Button and selecting Close (Excel 2003 and earlier: select File > Close). Then reopen *Training Tracker* with macros enabled.

Q. ***I installed* Training Tracker *and now I can't find the files.***

A. Use your operating system's search facility to search for `TrainingTrackerTemplate.xls`. You may need to search your local drives, network drives and removable media, such as USB drives. Wherever you find that file, you will find the other *Training Tracker* files.

Error Messages

Q. ***I open* Training Tracker *and all I get is a message saying that I have to open the file with macros enabled.***

A. *Training Tracker* requires macros to be enabled to function correctly. Close the workbook without saving by clicking the Microsoft Office Button and selecting Close (Excel 2003 and earlier: select File > Close), and then reopen the workbook. At the prompt, select Enable Macros.

Q. ***I copied some data to the* Records *sheet and I get an error message that says that data validation has been overridden and that changes have been undone.***

A. To maintain the integrity of the data on the **Records** sheet, many cells on the sheet have Data Validation set. Copying data to these cells overwrites these settings. When copying your data, use only the approved methods specified in the **Records Sheet** section of this *User Guide*.

Q. ***I tried to copy a* Start Date *and an* End Date *to the cells below on the* Records *sheet, but I get an error message saying that data validation has been overridden and that my changes have been undone.***

A. Copying up or down in one operation is prevented if the *Start Dates* and *End Dates* being copied are identical. To copy up or down identical *Start* and *End Dates*, copy one date at a time.

Q. ***Whenever I try to run a report or create a chart, I get an error message saying that a field name (column header) is missing on the* Records *sheet.***

A. Look on the **Records** sheet for data you may have entered in Column T and to the right of Column T. For each of those columns, check that you have entered a field name in the first row of each column.

It's Not Working

Q. ***Some records do not appear in reports and charts.***

A. Firstly, ensure that each record entered on the **Records** sheet is attributed a *Start Date*. Secondly, if you have entered or edited data since you lasted generated the report or chart, click the Refresh button on the selector bar.

Q. ***I accidentally overwrote the data validation settings for a cell on the*** **Records** ***sheet.***

A. Find the nearest cell within the same column that has data validation settings intact. Then select the intact cell, the corrupt cell and all of the cells in between and use Excel's Fill Up or Fill Down command to copy the data validation settings to the corrupted cell.

Q. ***I try to copy text from another location and paste it to a cell on the*** **Records** ***sheet, but nothing happens.***

A. Some copy and paste operations are restricted in *Training Tracker* in order to preserve the in-cell dropdown lists and the integrity of the data on the **Records** sheet. When copying your data, use only the approved methods specified in the **Records Sheet** section of this *User Guide*.

Q. ***The in-cell dropdown lists no longer appear on the*** **Records** ***sheet.***

A. To make them reappear, try selecting adjacent cells with the keyboard arrow keys and then moving back to the original cell. Disappearing in-cell dropdown lists may indicate that your PC is running low on memory. If the problem persists, try closing any programs you are not using or rebooting your PC.

Q. ***I imported data from another*** **Training Tracker** ***workbook, but the name of the Records Owner now appears in the place of the Company Name in the new file.***

A. The structure of the **Help** sheet has changed in *Training Tracker* Version 2.0 compared with earlier versions. After importing data from an earlier version of *Training Tracker*, you will need to manually copy and paste the name of the Records Owner to the *Records Owner* field.

Q. ***Whenever I try to import a workbook, Excel hangs or crashes.***

A. The workbook you are attempting to import is corrupted. Try opening the corrupted workbook before starting the import process and try using a version of Excel that is Excel 2002(XP) or later.

Q. ***I have protected my workbook and now*** **Training Tracker** ***hangs or crashes when I try to open it.***

A. If you protect your *Training Tracker* workbook using Excel 2007 or later and then open *Training Tracker* with macros disabled, Excel will not be able to open it. Close the workbook and open it again, ensuring that you open it with macros enabled.

Q. ***I have protected my workbook and now*** **Training Tracker** ***appears blank when I try to open it.***

A. If you protect your *Training Tracker* workbook using Excel 2003 or earlier and then open *Training Tracker* with macros disabled, *Training Tracker* will appear blank. Close the workbook and open it again, ensuring that you open it with macros enabled.

Q. ***I have protected my workbook and now* Training Tracker *opens in a small window.***

A. To reinstate the previous window size, unprotect the workbook by selecting the Review tab > Changes > Protect Workbook and remove the check mark next to Protect Structure and Windows (Excel 2003 and earlier: Tools > Protection > Unprotect Workbook). Enter your password when prompted to do so.

Q. ***I used a formula in the* Cost *field on the* Records *sheet to calculate the cost per participant. But now when I export the data, the formula is lost.***

A. All formulae are converted to values during the import and export process. Your data is not lost, only the formulae used to calculate the values. If you need to preserve the values, then copy and paste the formulae to the new workbook.

Q. ***I try to access the* Reports/Charts *sheet, but I get asked for a password***

A. A password has been set for protecting the **Reports/Charts** sheet. Either enter the password or remove password protection from the **Reports/Charts** sheet.

Q. ***Whenever I try to run a report or a chart, I am asked for a password.***

A. A password has been set for protecting the **Records** sheet. In order to create or update a report or chart, *Training Tracker* needs unprotected access to the data on the **Records** sheet. Either enter the password or remove password protection from the **Records** sheet.

Q. ***Whenever I try to open* Training Tracker*, I am asked for a password.***

A. If a password has been set for opening the workbook or a password has been set for the **Records**, **List**, **Reports**, **Charts** or **Help** sheet, you will be prompted to supply the password each time you open the workbook. Either enter the password or remove password protection from the workbook or sheet.

Q. ***I am trying to enter data into* Training Tracker*, but it is asking me for a password. Where can I get the password from?***

A. *Training Tracker* code, various formulae and workbook design elements are protected with a password to guarantee the integrity of the workbook and protect our intellectual property. However, unless you have set a password for one or more of the sheets, *Training Tracker* is designed to be able to perform all of its functions and activities without the use of passwords. Extra sheets are available at the end of the workbook that allow you to build your own custom reports and charts. If you would like the design of the workbook changed in any way, please contact us for a quotation on our customization services.

Q. ***I shared my* Training Tracker *workbook and now when I try to use Training Tracker I get error messages.***

A. *Training Tracker* is not designed for two or more people to edit simultaneously. To avoid error messages, turn off the Share Workbook and the Protect and Share Workbook options. Two or more people can access *Training Tracker*, with the first person to open *Training Tracker* gaining edit privileges. Other people opening the workbook concurrently will have read-only access. Ensure that you have the correct number of licenses for your situation.

Q. ***I tried to insert a new column on the* Records *sheet and* List *sheet, but I can't select a column.***

A. *Training Tracker's* reports and charts depend on the existing column structures in the default data areas. You can, however, insert columns to the right of the default data area on either sheet. The default data areas are Columns A to S for the **Records** sheet and Columns A to K for the **List** sheet.

How Do I

Q. ***An employee has moved to a different department. What do I do with their records?***

A. Leave intact the employee's records that were entered prior to the transfer. Enter the employee's new department and group in the *Department* and *Group* fields for all new training events from the time of the employee's transfer.

Q. ***One department/group has changed its name and a new department/group has been created in the latest organization restructure. What should I do?***

A. On the **List** sheet, add the names of the new department and group to the *Department* and *Group* lists. Also, add the new names of the renamed department and group and delete the old names. Leave intact training records that were entered prior to the restructure. For all new records following the restructure, enter the new department and group names in the *Department* and *Group* fields on the **Records** sheet.

Q. ***An employee has changed their name and I want all pre-existing records to show their new name.***

A. Enter the employee's new name in the *Participant* list on the **List** sheet. Unprotect the **Records** sheet and perform a Find and Replace operation, replacing all instances of the previous name with the new name.

Q. ***I have all of my data in an earlier version of* Training Tracker*. How do I get my existing data into the new version?***

A. Use *Training Tracker's* data import facility to import your existing data into a new workbook.

Q. ***I want to delete some unused columns on the* Records *sheet and* List *sheet, but these sheets won't let me.***

A. *Training Tracker's* reports and charts depend on the columns in the default data areas remaining intact. You can, however, hide the columns you are not using. The default data areas are Columns A to S for the **Records** sheet and Columns A to K for the **List** sheet.

Q. ***How do I change the field names on the* Records *sheet and* List *sheet to better match my company's naming conventions?***

A. Many of *Training Tracker's* functions depend on the field names remaining intact. For this reason, you are prevented from changing field names within the default data area. However, you may name any new fields you create any name you wish. The default data areas are Columns A to S for the **Records** sheet and Columns A to K for the **List** sheet.

Q. ***I accidentally deleted the report/chart title on the* Reports/Charts *sheet. How do I get it back?***

A. If you delete the title or title row (Row 4), simply select a report or chart type from the selector bar and click the Go button. The title will automatically regenerate with the new report or chart. If the title bar does not appear, click the Go button again.

11. Change History

VERSION	RELEASE DATE	CHANGE
2.1	22 Aug 2011	Added two new Manager reports: Training Activity by Group, Training Activity by Role Corrected inadvertent row deletions after filtering Records data and selecting another worksheet. Disabled auto-saving after auto-deletion of empty rows on Records sheet. Corrected hidden sheets displaying after user closes workbook without saving changes and reopens with macros disabled.
2.0	1 Apr 2010	Restyled index, reports and charts. Improved interface and simplified navigation. Improved reliability of reports by generating on the fly. Added four new standard reports and one new chart. Three Reports sheets consolidated to a single sheet. Two Charts sheets consolidated to a single sheet. Added report and chart copying functionality. Expanded data validation ranges for dates, costs and hours. Added data import and export functionality. Added data import template for importing from HRIS. Included guidance on linking unique employee and course identifiers. Included guidance on adding reminder/warning flags and countdown timers. Included guidance on adding a refresher training report. Added ability to accommodate user's company name. Simplified process for creating Sample file. Improved data protection and error handling. Improved handling of Microsoft Antivirus API. Optimized code and improved code structures.
1.01	11 Mar 2006	Corrected VBA script to accept US and UK date format in Data Validation. Corrected List only tab showing on startup in Excel 2003.
1.0	1 Nov 2003	Initial Release

12. How to Contact Us

We appreciate your comments and feedback and encourage you to drop us a line. Your feedback will help us to further enhance our products so that we can even better meet your needs.

You can contact us at:

Email address:	feedback@businessperform.com
Telephone:	+61 0408 314941
Website:	www.businessperform.com

13. About Business Performance Pty Ltd

Established in 2003, Business Performance Pty Ltd provides business and management consulting services globally. The company delivers coaching and consulting services in a range of business areas, from small business, leadership and management, strategic planning and organizational change to employee development and career coaching. All services are provided by highly experienced consultants specializing in their area of expertise.

From its website, Business Performance Pty Ltd also proudly supplies a wide selection of business and management software products designed to make managing organizations easier and more effective. Products featured include tools, templates and guides in the areas of training and employee development, project management, organizational change, career planning and web development. All products can be purchased and downloaded easily from anywhere in the world from the Business Performance Pty Ltd website at www.businessperform.com.

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14. Index

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