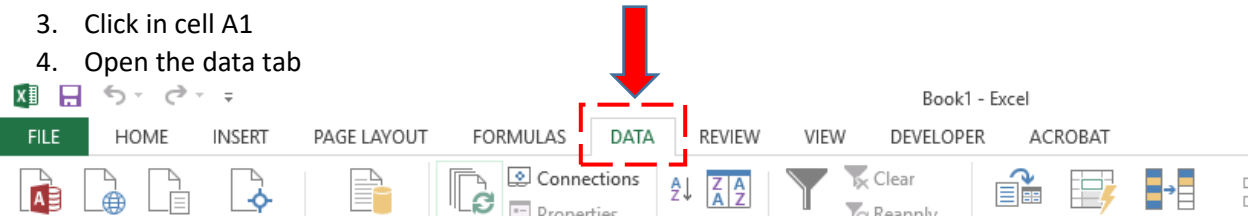


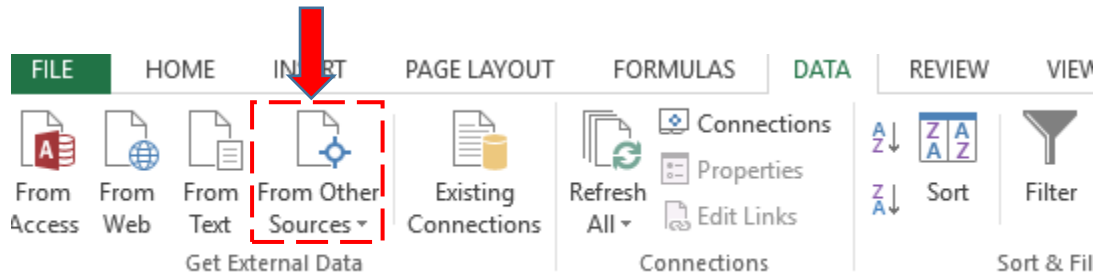
## Procedure for Combining Spreadsheets and Reporting Non-Compliant Training

1. Download the reports from ACME and save them in the following folder  
BillComFiles\training\ACME reports
  - a. Within this folder you must create an additional folder labeled by the date the reports were downloaded.
  - b. Downloaded reports must be saved with the .csv extension.

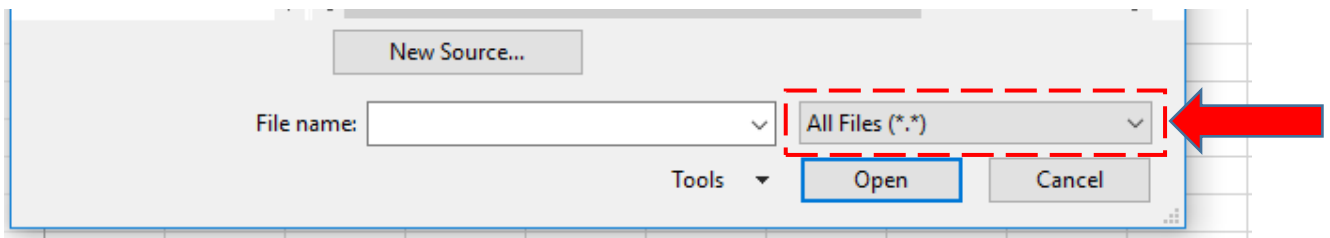
2. Open a blank Excel worksheet.
3. Click in cell A1
4. Open the data tab



5. In the Get External Data Box select "From Other Sources"

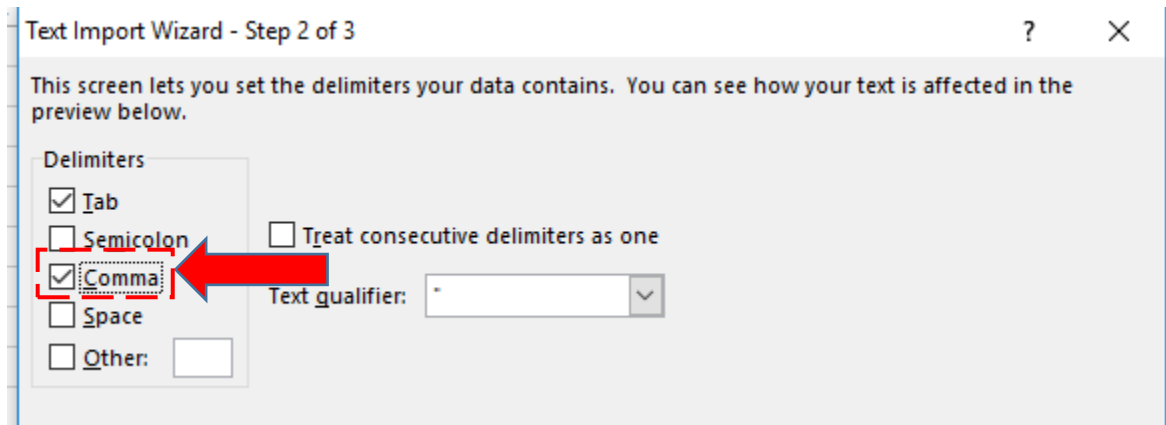


6. Choose the option from XML data sources
7. Find the folder were you stored your ACME reports
8. In the drop down folder for file type you must change the selection to "All Files"



9. Select the file you would like to import into the spreadsheet and click "Open"
10. The default will be to Delimited, select "Next"
11. Do not change the Delimiter section, but check mark the Box next to "Comma"

## Procedure for Combining Spreadsheets and Reporting Non-Compliant Training



12. The preview pane will show you that the data is now placed into columns.
13. Click "Next"
14. Leave the format as general and select "Finish"
15. On the next screen select "OK"
16. The data will be imported
17. Go to a row one and make all of the columns in row one **bold**
18. Add filters to the text in row one
19. For ease of reading you may decrease the width of the columns A "LastName" and B "FirstName"
20. To add another report, click control + end
  - a. This will take you to the last cell containing data press the down arrow once and then press the left cursor in a row until you arrive at column A
21. Repeat steps 4 through 16
22. Right click on the cell where you pasted the first element of data and select delete
  - a. Before you press enter you must also change the selection to entire row
  - b. Press "enter"
23. Step number 22 will delete the column Headings from the second data set
24. Repeat this process until you have incorporated all of the compliance assigned training reports

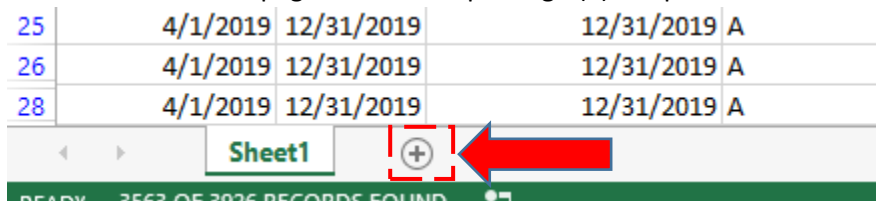
### Filtering the data for report

1. Open the filter in column R Labeled "Employee Status" and remove the selection labeled T and labeled Blank, click "OK"
2. Open the filter in column P labeled "CompletionDate" and remove the checkmark from the box by 2019, click OK
3. Open the filter in column H labeled "Position" and remove the following job positions;
  - a. adjunct associate professor
  - b. adjunct assistant professor
  - c. adjunct instructor
  - d. adjunct professor
  - e. adjunct scientist
  - f. clinical associate professor

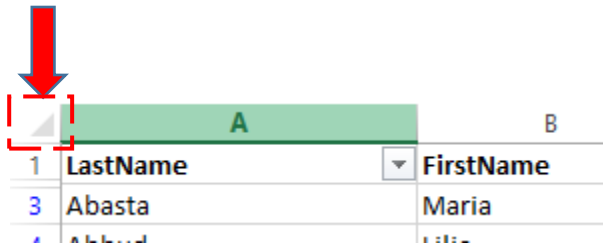
## Procedure for Combining Spreadsheets and Reporting Non-Compliant Training

- g. clinical associate professor HSC
- h. clinical assistant professor
- i. clinical assistant professor HSC
- j. clinical instructor
- k. clinical instructor HSC
- l. clinical lecturer
- m. clinical lecturer HSC
- n. international visiting scholar
- o. non- tech employee
- p. any title starting with the word relief
- q. any title starting with the word recurrent
- r. Retiree insurance

4. At the bottom of the page click on the plus sign (+) to open a new work sheet



5. Click on the worksheet tab labeled sheet 1 and press control + home to return to the very beginning of your data.
6. Click on the corner arrow between the number 1 and A



7. This will select the entire page of data, control + C to copy this data set
8. Click on the worksheet tab at the bottom of the page labeled sheet 2 to open the worksheet you just created
9. Click in cell A1
10. Press Control + V, this will paste the entire dataset into the second worksheet.
11. Please note that the pivot table function will not work properly if there are blank fields so we must remove columns P "CompletionDate" and Q "Notes"

### Remove employees that no longer work here (VLOOKUP)

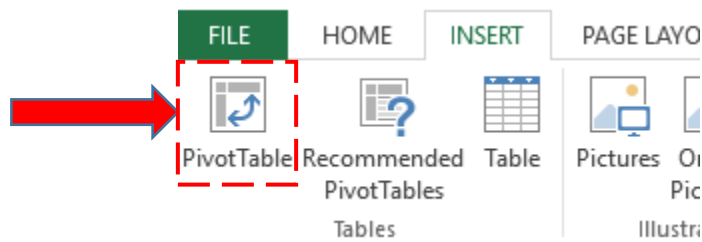
1. At the bottom of the page click on the plus sign to open a new work sheet
2. Return to work sheet number 2
3. Click on column C to highlight the entire column and then press control + C
4. Return to work sheet number 3 and paste this data in column D1

## Procedure for Combining Spreadsheets and Reporting Non-Compliant Training

5. Open a new excel spreadsheet and open the following file: Batman:\Excluded Provider Check\Employee List\2019\((the most current date)
  - a. Please note that the folder 2019 will change to represent the current year.
6. Highlight columns B and see and press control +C
7. Paste this data into cell A1 of worksheet 3
8. Assign the name HR two column C
9. Combine the first came and the last name into column C by using the following formula:
  - a.  $=B2&" "&A2$
  - b. Drag this formula down throughout the entire column
10. Label column E VLOOKUP
11. Click on column C1 and highlight all of the text, right click on the highlighted area and select define name.
12. The name of default to HR, this is fine, click OK
13. In cell E1 program the VLOOKUP function.
14. Any individual that is represented by #N/A must be removed from sheet to prior to creating the pivot table.
15. Remove these individuals by deleting the entire row on which their name appears.

### Pivot Table Filtering of the Data to Distribute to Users and Their Supervisor

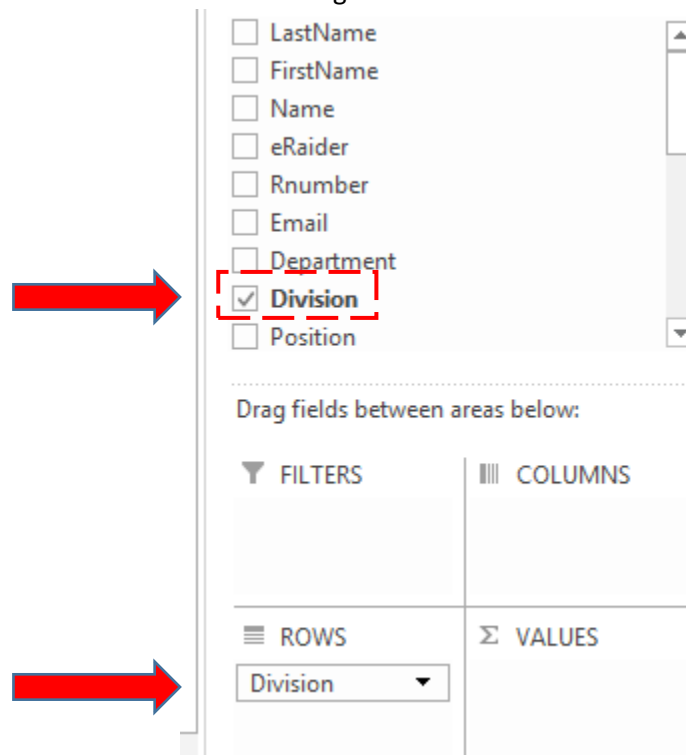
1. Reduce the width of columns A and B so the data will be easier to read
2. Click in any cell in column C
3. Right click in this cell
  - a. Select "insert"
  - b. Select "entire column"
4. Write "Name" in the column heading
5. Click on the number one to select the entire row and then and filters
6. Combine the first came in last name into column C "Name" by using the following formula:
  - a.  $=B2&" "&A2$
  - b. Drag this formula down throughout the entire column
    - i. Please note may double click on the SMS we're in the right hand corner to automatically populate the formula down the column however, the formula will break at the beginning of each new report that was added so you'll have to go down to each new data set and repeat the above process.
7. Unclick out of the selected Column C and click any cell in the spreadsheet within data
8. On the insert tab select "pivot table."



9. Do not change the selections and click "OK"

## Procedure for Combining Spreadsheets and Reporting Non-Compliant Training

10. On the right hand Pivot table field box drag the “division” down to the row area



11. Drag the “department” field and place it under “division”

12. Drag the “name” field and place it under “department”

13. Scroll down the list of pivot table fields until you see “course title” and drag it under the name field