Vacation and Attendance Tracker Dashboard in Excel

Become an Excel Dashboard Expert



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CHAPTER 1 - Introduction

Overview

In this course, you will learn how to create a visually appealing and functionally effective Dashboard that can be used to track employee or student attendance and vacation.

I will start with a blank Excel workbook and build the various components step by step. Not a single step will be left out.

There will be no programming/VBA/Macros. You will learn the true power of Excel formulas and conditional formatting to deliver simple and effective Dashboards in Excel.

By the end of this course, you will learn how to build the dashboard yourself. Along the way, you will also learn several useful Excel features, tips and tricks that will be handy for you to build other Excel applications as well.

You will be on your way to become an Excel Dashboard Expert.

Team Dashboard Screenshot



Employee Report Screenshot



What you will learn about Excel

Apart from learning how to build the Vacation and Attendance tracker, you will learn the following about Excel.

- Data Input Techniques Excel Tables, Drop Down List, Check Box
- Named Ranges
- Writing Simple and Advanced Formulas (nested functions)
- Conditional Formatting using formulas
- Functions
 - DATE, MONTH, EOMONTH, WEEKDAY
 - ROW, INDEX, MATCH
 - IF, COUNTIFS, SUMPRODUCT
 - IFERROR, OR, SUM
- 10-Point Formatting Checklist
- Release Checklist

Requirements for Course

Skill

Since I will walk through each step involved, there is no pre-requisite knowledge for this course. However, if you are completely new to Excel, then I would recommend the free <u>Useful Excel for</u> <u>Beginners</u> course first.

If you have used Excel before and written simple formulas, then you should be able to follow this course.

Software

You will need **Microsoft Excel** installed in your computer. Most of the features used are compatible with <u>Excel Online</u> (free web version of Excel), but when a feature is not compatible, it will be specified along with an alternative technique.

About the Instructor/Author

I, Dinesh Natarajan Mohan, have been working with Microsoft Excel since 2001. My specialty is in the field of Reporting and Analytics. I have experience leading Reporting and Analytics teams in different domains such as Finance, Marketing and Operations in the U.S. <u>LinkedIn Profile</u>

From 2013, I have been publishing Excel templates on my website indzara.com. As of writing this, I have published more than **50 Excel templates**, both free and premium. The templates have been downloaded and appreciated by users from more than **100+ countries**. So far, there have been more than **7000 premium customers** and more than **500,000 downloads** of the free templates.

I also publish video demos of all my Excel templates in my <u>YouTube Channel</u> which has more than **10,000 subscribers** and been viewed more than **2 Million times**. I have published more than **235 free videos**.

While I have been focused on building Excel templates and sharing with others, I was receiving a lot of questions around how to build such templates. That led to creating this course. As the *Employee Leave/Vacation Tracker* is one of the most popular templates on indzara.com, I decided to publish a course on how to build this template.

I have spent on average more than 50 hours on each template start to finish, including concept, market research, design, development, testing, documentation and publishing. From the numerous lessons I have learned in the last 6 years of building Excel templates, I have been able to simplify the process of creating templates. Even this Vacation tracker template required several hours of work and many iterations to arrive at a solution that was simple and effective. In this course, you will be able to learn those techniques in less than 5 hours. I am very excited to share what I know with you.

Template Scope

We must first decide scope – features that are going to be part of the template.

- Practical Features
 - o Track vacation and attendance for multiple employees
 - Handle employees joining and leaving the company anytime
 - Support multiple types (5) of employee vacation/leave
 - Accommodate company holidays and weekends
 - Handle partial days (e.g. Half day) of leave
- Make it easy to use
 - Easy to enter Vacation in ranges of dates (example: 4 days from Nov 21st to 24th)
 - Can use the template continuously for many years (keep all data organized in 1 file)
- Customizable to meet business needs
 - o Should be easy to customize colors to suit preferences
 - Allow companies to choose which days are weekends/holidays
 - o Allow renaming types of employee vacation/leave
- Automated Calculations and Output
 - Calculate Worked Days automatically
 - Fully Automated and interactive Dashboard with monthly view of all employees
 - o Automated Annual Employee attendance report where we can choose employee
 - Printer-friendly and easy to share as PDF

Given the above requirements, we will need to create the following 5 sheets.

- 1. Data Input: Data that will be entered by the user
 - 1. Settings: Types of Vacation, Company Holidays, Company Weekends
 - 2. Employees: List of Employees & their Start and End Dates
 - 3. Vacation: Employee Vacation dates
- 2. Output: Information that Template will calculate automatically based on input
 - 1. Team Dashboard which will display information for all employees
 - 2. Employee Report which will display days when employee attended or was on vacation.



Arriving at the final set of requirements and approach to solution takes many iterations. The more you develop in Excel, you will get faster at this.



CHAPTER 2 - Setting up Inputs

2.1 Types of Vacation

The template we build will be able to track multiple types of vacation. So, first, let's make a place to store the different types of vacation.

In the first sheet, type VACATION TYPE and then the names of Vacation types below.

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2							
3	VACATION TYPE						
4	Vacation						
5	Sick						
6	Unpaid						
7	Half Day						
8							
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Convert the list to a Table.



Excel Tables is one of the absolute essentials to learn.

Excel Table is a rectangular shaped dataset, which has one or more rows and one or more columns. Once we make a dataset a Table, Excel activates a lot of useful features.



Select cells and press Ctrl+T.

F	ile Home 1 Ir	isert	Draw	Page Layout	Fc	rmulas	Data	
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AB	}		(Ctrl+T)		[VACAT	ION TYPE	
	А		e a table to e related o	organize and lata.			F	
1		Tables make it easy to sort, filter, and format data within a sheet.						
3	VACATION TYPE Vacation	<u></u> (?) т	ell me mo	re				
5	Sick							
6	Unpaid							
7	Half Day							
8								
9								
10 11								
11								

In the next dialog box, make sure that you select 'My table has headers' and then press OK.





Table is now created.

Benefits of Excel Tables

• Stores information in an organized way

• Makes it easy to retrieve information when needed

- Can be used as a source of calculations
- Can also be used to perform calculations
 - Makes it easy to add new rows of data
 - Easy to write and understand formulas

Excel will provide a default name Table1.

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1								
2								
3	VACATI	ON TYPE	*					
4	Vacatio	n						
5	Sick							
6	Unpaid							
7	Half Day	y						
8								
9								
10								

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Rename the table as T_VACTYPE by typing directly in the Table Name box and pressing Enter.

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F	ile	Home	In	sert D	raw	Page	e Layout	F	ormulas	Data	a
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4	Vacati	on									
5	Sick										
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Tip: Naming tables allows to easily recognize which table we are referring to and makes writing and understanding formulas so much easier.

*

The appearance or the design of the table can be changed. Excel provides many options to choose colors, borders and fonts as desired by the user. We can change them from the **Table Styles** in the **Table Tools – Design** ribbon. These options appear only we have selected a cell inside the Table.

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Pr	operties		To o	ols		Exte	rnal Table Da	ita		Ta	ble Style Opt	ions					Tabl	e Styles				
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Table Styles

I usually use a style that clearly shows the header as well as the border of the last row. This allows us to visually see the first & last row and thus know the boundaries of the table. I use the banded rows approach so that it's easier to read data across.

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Now, our table appears like below.

	А	В	С	D
1			Header	
2			Row	
3	VACATION TYPE	-	Row	
4	Vacation			
5	Sick			
6	Unpaid			
7	Half Day			
8				
9			Table	
10			oundary	
11			Sundary	
12		_		

The top row is the **header row**. This row houses the names of the columns so that we understand what each column represents. **Columns** are also referred to as Fields.

We are also going to provide support to partial days of leave by allowing a value to be assigned to each Vacation Type. We can enter this in the same Table as a new column.

Adding column to a table is very easy. Just start typing a new column name right next to the existing column name.

	А	В	С
1			
2			
3	VACATION TYPE	VALUE	
4	Vacation		
5	Sick		
6	Unpaid		
7	Half Day		
8			
9			
10			
11			
12			

After pressing **Enter**, the new column is created.

2	А	В	С	[
1				
2				
3	VACATION TYPE 💌	VALUE 🔽		
4	Vacation			
5	Sick			
6	Unpaid			
7	Half Day			
8				
9				
10				
11				
12				
13				
14				

Now, type the values in that column.

	А	В	С	D
1				
2				
3	VACATION TYPE	VALUE 💌		
4	Vacation	1		
5	Sick	1		
6	Unpaid	1		
7	Half Day	0.5		
8				
9				
10				
11				
12				
13				
14				
15				

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Depending on the requirements, *Value* could be different. If your goal is to just calculate how many days the employee will be taking time off and hence be not available to work, then Unpaid and Paid leave can be treated to have same value of 1. But if we want to track only paid time off, then we may give Unpaid leave 0 as value. Please choose the values as needed for your business.



If we want to add one more Vacation Type, it is easy, as we have created a table already.

Just type the new vacation type name in cell immediately following the end of the table.

	А	В	C	2	D	E		F
1				H	f row 7 i	s the las	st	
2			_		row of	Table		
3	VACATION TYPE 🔻	VALUE 💌		-				
4	Vacation	1						
5	Sick	1		- 1				
6	Unpaid	1		_	Ente	ring in		
7	Half Day	0.5				8 will		
8	_							
9			-	_		natically		
10					add t	o table		
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14					Ente	ring in		
15						w after		
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17						o table		
18					auui	otable		
19								
20							-	
21								

Type 'Other' (or any new name) in cell A8 and then press Tab key to move to next column. Type the value and press Enter.

—			
	A	В	C
1			
2			
3	VACATION TYPE	VALUE 💌	
4	Vacation	1	
5	Sick	1	
6	Unpaid	1	
7	Half Day	0.5	
8	Other	1	
9			
10			
11			
12			

You could use this approach to even highlight non-vacation days. If you put 0 as value, then it will not count towards vacation days. If you want to highlight offsite activities or travel dates, etc., if you assign 0 as value to that leave type, then it will be highlighted on the calendar which we will see later.

We work with 5 vacation types in this course. However, you can add more vacation types in this step, if you need to track more than 5 vacation types.

EXTENSION TIP

Inserting and Deleting data from Table



Right click inside the table and choose Insert. You can insert rows or columns.

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To delete, right click inside the table and choose **Delete**. You can delete rows or columns.



How to ensure data is entered inside tables?

If you click in a cell inside the table, then you will see a new ribbon appear called **Table Tools**.

	Ta	able Tools			
Help		Design	ר ⊂ P Tell m	e what you wan	nt to do
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9 (.00 -	00 20	Conditiona Formatting	al Formatas ▼ Table ▼	Check Cell	Explanatory
ımber	r _a				

2.2 Weekends

We want to allow the user to choose the days that are weekend days so that we can exclude the weekend days when we count working days.

Let's type Day and Sunday.

	А	В	С	D	E	F	G
1							
2				_			
3	VACATION TYPE 💌	VALUE 💌			Day		
4	Vacation	1			Sunday		
5	Sick	1					
6	Unpaid	1					
7	Half Day	0.5					
8	Other	1		_			
9							
10							
11							
12							

If you select the Sunday cell and drag it down to 6 more cells, Excel will automatically populate the other weekdays.

Excel fills the series for us to help with data entry, as it knows the common series such as days of week, months in a year, etc.

Day Sunday				
Monday				
Tuesday				
Wednesd	ау			
Thursday				
Friday				
Saturday				
	õ	<u>С</u> ору	(Cells	
	۲	Fill <u>S</u>	eries	
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	0	Fill <u>D</u>	ays	
	0	Fill <u>W</u>	<u>/</u> eekdays	
	0	Flash	Fill	

We will now learn how to use **Check Box** form control to allow user to select weekend days for their company.



Check Box does not work in Excel Online yet. So, if you plan to use your file online to edit in your browser, then please do not use this technique. Instead you can use the drop-down list technique, which we will learn soon.



Select **Customize Ribbon** on the left sidebar and then check the box next to 'Developer' on the right side.



Press OK.

Now Developer ribbon appears.

	File Home	Insert	Draw	Page	Layout	Form	ulas	Data	Review	View	Developer	Help	о 🔎 Tell r
^	Visual Macros	Record Macro Use Relative R Macro Securit	eferences	Add- ins	کی Excel Add-ins	已 COM Add-ins	Insert	Design Mode	E Properties	Source	Hap Prop Expansion	Packs	Export
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Insert Check Box control.

File	Home	Insert	Draw	Page	Layout	Form	ulas	Data	Revi	ew	View	Developer	1Hel	р
Visual Basic	Macros	ord Macro Relative Refe cro Security	erences	Add- ins	Excel Add-ins	COM Add-ins	Insert	2 Design Mode	E Prop	v Code	Source	Hap Pro Description Map Pro Expansio Expansio Refresh D	n Packs	
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Then, click where you want the box to be and drag to create the check box.

Right click on the check box and then select Edit Text.



Remove the default text in the box. This text is usually difficult to format. We will not need that text as we will use the text that we typed already in the previous column.

Day	
Sunday	
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	

Right Click and select Format Control.



Now, we want to establish the link from the Check Box control to a cell.

In the **Control** tab, select cell \$F\$4 as Cell link.

Day			Format Con	to al								
Davi				itrol						?	\times	-
Day Sunday Monday Tuesday Wednesday Thursday Friday Saturday			○ <u>C</u> heck ○ <u>M</u> ixed Cell <u>l</u> ink: [ecked ked J SFS4	Size	Protectio		Propertie	s Alt Text	t Cont		
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	Monday Tuesday Wednesday Thursday Friday	Monday Tuesday Wednesday Thursday Friday	Monday Tuesday Wednesday Thursday Friday	Monday O-O-O Value Tuesday Image: Constraint of the state of the	Monday Unchecked Tuesday Image: Constraint of the second	Monday OOOO Value Tuesday Image: Coool of the state	Monday O-O-O Value Tuesday Image: Constraint of the state of the	Monday Image: Constraint of the second sec	Monday OOOO Value Tuesday Image: Constraint of the state of the	Monday Tuesday Wednesday Thursday Friday Saturday Saturday Saturday Saturday Saturday Saturday <td>Monday Tuesday Wednesday Thursday Friday Saturday Image: Second structure Image: Second str</td> <td>Monday Tuesday Tuesday Wednesday Thursday Friday Saturday Saturday Saturday Saturday Saturday Saturday S</td>	Monday Tuesday Wednesday Thursday Friday Saturday Image: Second structure Image: Second str	Monday Tuesday Tuesday Wednesday Thursday Friday Saturday Saturday Saturday Saturday Saturday Saturday S

Now that we have created the link, when you click on the check box to select, the cell F4 will display TRUE.

D	ау		
S	unday	TRUE	
N	londay	5	
Т	uesday		
W	/ednesday		
Т	hursday		
Fi	riday		
Sa	aturday		

If you click on the box again to uncheck or deselect, then the text display in cell F4 says FALSE.

Day	
Sunday	FALSE
Monday	5
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	

This is how we can let the **Check Box** control change the value. If it is checked, Sunday is a weekend, if it is not checked, it is a working day. We will implement that functionality using formulas later. However, getting the Check Box to turn a cell TRUE or FALSE is the starting point and that is done now.

Now, we need to create this for other 6 days.

- Select cell F4 and press Ctrl+C to copy.
- Now, select cells F5 to F10.
- Press Ctrl+V to Paste

Day		•
Sunday	TRUE	<u>.</u>
Monday	TRUE	
Tuesday	TRUE	
Wednesday	✓ TRUE	
Thursday	✓ TRUE	
Friday	TRUE	
Saturday	TRUE	
		Ctrl) ▼

All the new checkboxes will also be pointing to the same cell F4.

We must change each of them to point to a different day (checkbox next to Monday should point to cell F5 (Monday).

After changing all the check boxes, we will change the font color to white.

File	Home Insert	Draw	Page Layou	t Formulas Data	Review
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	board 🗔	Fon	Automatic	ent	
				Theme Colors	
F4		*	× v		
D	E	F	G	White, Background 1	к
1					
2					
3	Day			Standard Colors	
4	Sunday	TRUE			
5	Monday	TRUE		More Colors	
6	Tuesday	TRUE			
7	Wednesday	TRUE			
8	Thursday	TRUE			
9	Friday	TRUE			
10	Saturday	TRUE			
14					

This is done only for cosmetic purposes. Check box itself visually shows selected or not. So, we don't need the display of TRUE or FALSE as well. Though the value is necessary for calculations, we don't need it to be visible.

We will have the following appearance which is much cleaner.

Day		
Sunday	✓	
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday	✓	

To wrap this section, let's name the range of cells F4 to F10 as L_WKND. This is a list of weekend selections that we can use later in our formulas.

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L_	WKND		: ×	: × ✓ f _x true			
	А	в 🖓	С	D	E	F	G
1							
2							
3	VACATION TYPE	VALUE 💌			Day		
4	Vacation	1			Sunday	v	
5	Sick	1			Monday		
6	Unpaid	1			Tuesday		
7	Half Day	0.5			Wednesday		
8	Other	1			Thursday		
9					Friday		
10					Saturday	✓	
11							
12							

Named Range is a range of cells that we can assign a name to. Then, we can refer to the range in any formula by just mentioning the name.

You can see all the named rages in the *Name Manager* (find in Formulas Ribbon – Shortcut Ctrl+F3). Excel tables are automatically created as named ranges by Excel.



2.3 Company Holidays

To allow the user to choose the days that are company holidays, create a simple Table of holidays.

D	E	F	G
	DAY		
	Sunday Monday		
	Tuesday		
	Wednesday		
	Thursday		
	Friday		
	Saturday	✓	
-			
-	DATE	HOLIDAY	-
		New Year	
		May Day	
_			

Select the cells and press Ctrl+T to create Table.

DATE	Ŧ	HOLIDAY	-
1/1/20	18	New Year	
5/1/20	18	May Day	

Rename the table as T_HOLS.

F	ile Ho	me Ins	sert Draw	Page Layou	it Forr	nulas		
Т_Н	e Name: IOLS Resize Table	Rem	marize with Piv ove Duplicates vert to Range	otTable Insert Slicer	Export Re	fresh		
F	Properties		Tools		External Tal			
F1	6		Ŧ	: × 🗸	f _x [Иау Day		
	С	D	E	F	G	н		
10			Saturday	•				
11								
12								
13								
14			DATE	HOLIDAY 🔽				
15			1/1/2018	New Year				
16			5/1/2018	May Day				
17								

Select the dates alone and name the list as L_HOLS.

L_	L_HOLS : × ✓ fx 1/1/2018										
	С	D	E	F	G	Н	1	J			
10			Saturday	✓							
11				ф.							
12				50 ⁴							
13											
14			DATE 🔽	HOLIDAY 🔽							
15			1/1/2018	New Year							
16			5/1/2018	May Day							
17											
18											

This will be handy when we write formulas later.

Let's name the sheet itself as SETTINGS and we are done with the work on this sheet for now.

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32						
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2.4 Employee Data

Create a new sheet if needed or rename the default sheet as EMPLOYEES.

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30										
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33										
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38										
	4	•	SE	TTING	SS	EM	PLOYEES		÷	
Rea	dy	1				-		•		

Type a few rows of employee data, to begin with.

	A	В	С	D	
1	EMPLOYEE NAME	START DATE	END DATE	DEPARTMENT	
2	Employee 1	1/6/2015	6/10/2018	HR	
3	Employee 2	6/12/2018		Finance	
4	Employee 3	5/1/2017		Sales	
5	Employee 4	5/1/2018		HR	
6					
7					
8					
9					
10					

The critical fields here are Employee Name, Start Date and End Date.

Now, select the cells and press Ctrl+T to convert to a Table.

	А	В	С	D	E
1	EMPLOYEE NAME	START DATE 💌	END DATE 💌	DEPARTMENT	
2	Employee 1	1/6/2015	6/10/2018	HR	
3	Employee 2	6/12/2018		Finance	
4	Employee 3	5/1/2017		Sales	
5	Employee 4	5/1/2018		HR .	
6					
7					
8					
9					
10					

As we begin using dates, I just want to clarify that we can change how dates are displayed, to meet our needs.

	А	В	С	D	E	Format Cells				? ×	N
1	EMPLOYEE NAME										
2	Employee 1	1/6/2015		HR		Number Alignment	Font Border	Fill Protecti	on		
3	Employee 2	6/12/2018		Finance		<u>Category:</u>					
4	Employee 3	5/1/2017		Sales		General	Sample				
5	Employee 4	5/1/2018		HR		Number	1/6/2015				
6						Currency Accounting	Type:				
7						Date Time	*3/14/2012			A	
8						Percentage	*Wednesday, Marc	ch 14, 2012			
9						Fraction	2012-03-14 3/14				
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Once we apply any date format, the display will change. Example: As shown below.

	А	В	С	D
1	EMPLOYEE NAME	START DATE 🗾 💌	END DATE	DEPARTMENT
2	Employee 1	06-Jan-2015	10-Jun-2018	HR
3	Employee 2	12-Jun-2018		Finance
4	Employee 3	01-May-2017		Sales
5	Employee 4	01-May-2018		HR _
6				
7				



If you are developing a template for global audience, I suggest showing the month in name and not number. As some countries use DD/MM/YYYY format and some use MM/DD/YYYY, it is possible that the dates can be misinterpreted. Please use DD-MMM-YYYY format.



Name the table T_EMP.

F	File Hom	ie Ins	ert Draw	Pa	age Layou	t Fo	ormulas	Data	Review
T_E	le Name: MP T Resize Table Properties	Remo	narize with Pivot ove Duplicates ert to Range Tools	Table	Insert Slicer	Export	Refresh -	Droperties Open in B Unlink Table Data	
C	3		•	3	× ✓	$f_{\mathcal{K}}$			
	A		В		C			D	E
1	EMPLOYEE I	NAME 🔽	START DATE	-	END DAT	TE 💌	DEPARTI	MENT 💌	
2	Employee 1		06-Jan-3	2015	10-Ju	un-2018	HR		
3	Employee 2		12-Jun-2	2018			Finance		
4	Employee 3		01-May-3	2017			Sales		
5	Employee 4		01-May-2	2018			HR		
6									
7									

Name the list of employee names L_EMP.

Fil	le	Home	e Ins	ert	Draw	Pa	ge Layou	it Fo	ormulas	Data	Review	/
T_EN ∙⊕• R	e Name: MP Resize Ta Propertie	ible	🗊 Sumr Remo 🖓 Conv	ove Du		tTable	Insert Slicer	Export •	Refresh Extern	E Propertie 글 Open in 유생 Unlink al Table Data		 ✓ F □ T ✓ F
L_E	EMP]					>	< <	f_{x}	Empl	oyee 1		
		А			В		C	;		D	Е	
1	EMPLO	YEE N	AME 💌	STAR	T DATE	-	END DAT	TE 💌	DEPAR	RTMENT 💌		
2	Employ	/ee 1			06-Jan-	2015	10-Ju	un-2018	HR			
3 8	Employ	/ee 2			12-Jun-	2018			Financ	e		
4	Employ	/ee 3			01-May-	2017			Sales			
5 8	Employ	/ee 4			01-May-	2018			HR			
6												
7												

2.5 Employee Vacation Data

Create a new sheet and name it VACATION.

36				
37				
38				
	SETTING	SS EMPLOYEES	VACATION	÷
Ready 🚦				

Enter the column headers and convert to a table.

	А	В	С	D	E	
1	EMPLOYEE NAME	START DATE 🛛 💌	END DATE	VACATION TYPE	NOTES	•
2						
3						
4						
5						
6						
7						

Before we enter the data in this table, we will implement some data validations. For example, the employee name entered in column A should match one of the employee names in our Employees sheet.

Similarly, Vacation Type entered in column D should be from one of the Vacation types in Settings sheet.

To do this, we need to select cell A2 and click on Data Validation in the DATA ribbon.

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File	e Home	Insert Dr	raw P	Page Layout	Formulas	Data F	Review View	Developer	- Help	Design	م ر	Tell me	what you want to	do	
Get Data	From From • Text/CSV Web	From Table/		Existing Connections	Refresh All - C Ed	ueries & Conne operties it Links & Connections	z↓ A	t Filter	Clear Reapply Advanced	Text to Columns		Remove Duplicates	Data Conso Validation + Data Tools	lidate Relationships	Manage Data Mode
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A2			•	× ✓	f _x									f rules to limit the	
	А	6	в	С		D	E		F	G	н			can be entered in a	M
1 E	MPLOYEE NAME	💌 START D/	ATE 🔽	END DATE	VACA	TION TYPE 🔽	NOTES	-	1				cell.		-
2														ı can provide a list	
3													of values, like 1,	2, and 3, or only reater than 1000 as	
4													valid entries.	reater than 1000 as	
5													@ . .		
6													⑦ Tell me mo	re	
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Then, choose **List** in the **Validation Criteria**. Click in **Source** and press **F3**. This will open the second dialog box. Select the name L_EMP (which is our list of employee names).

Data Validation		? ×				
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Validation criteria					. ,	
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Validation criteria Allow: List ~ Data: between ~ Source:	✓ Ignore <u>b</u> lank ✓ <u>I</u> n-cell dropdown ✓	ß		С		

Press OK.

The drop-down list will now appear.

	А	В	С	D	
1	EMPLOYEE NAME	START DATE	END DATE	VACATION TYPE	NOTES
2					
3	Employee 1	13			
4	Employee 2 Employee 3				
5	Employee 4				
6					
7					
8					

To implement a similar drop-down list for Vacation Type, we need the list of Vacation Type names. First, create the list L_VACTYPE in Settings sheet.

L_	VACTYPE		: ×
	А	В	С
1			
2			
3	VACATION TYPE	VALUE 💌	
4	Vacation	1	
5	Sick	1	
6	Unpaid	1	
7	Half Day	0.5	
8	Other	1	
9			
10			
11			

All the named ranges can be viewed under **Name Manager** in **Formulas** ribbon.

Home Insert Draw Page	Time • Reference •	Image: Definition of the second s	in Formula ▼	ign \wp Tell Precedents v_{X} S Dependents $\stackrel{\bullet}{\bigotimes}$ E ve Arrows \star $\stackrel{\bullet}{\bigotimes}$ E Formula	irror Checking v Waluate Formula Wi
A B C	√ fx Vacat D E Name Manager <u>N</u> ew	F G H	I J	K L	M N ? X
on 1 1 1 y 0.5 1	Name	Value ("Employee 1";"Employee 2";"Employee ("Vacation";"Sick";"Unpaid";"Half Day"; ("Employee 1","06-Jan-2015","10-Jun-2 ("1/1/2018","New Year";"5/1/2018","Maj ("Vacation","1";"Sick","1";"Unpaid","1";" (",",",",",")	"Other"} = T_VACTYPE[VA 018","HR";"E = EMPLOYEES!\$ v Day"} = SETTINGS!\$E\$	CATI Workbo A\$2: Workbo 15:\$ Workbo 4:\$B Workbo	Comment
	Refers to:	EMPLOYEE NAME]			> Close

Implement the drop-down list as explained earlier.

А	В	С	D	E
EMPLOYEE NAME	START DATE	END DATE	VACATION TYPE	NOTES
				-
			Vacation Sick Unpaid Half Day Other	



Data Validation Drop-down lists work only within the table. If you enter a new row, once the new row becomes part of the table, the data validation will work.

Enter few rows of data and then save table as T_VAC.

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EMPLOYEE N		START DATE 🛛 💌	END DAT	TE 💌	VACATION TYPE	• N	OTES	-	
Employee 1		05-Jan-2018	10	0-Jan-2018	Vacation	Er	mployee 3 will be l	backup	
Employee 2		10-Jul-2018	1	1-Jul-2018	Sick				
Employee 3		05-Jun-2018	12	2-Jun-2018	Vacation				
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This completes our Data Input sheets.

Now, we need to work on Output sheets Team Dashboard and Employee Report.



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& video course.



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