

Create a Vacation and Attendance Tracker Dashboard in Excel

# Vacation and Attendance Tracker Dashboard in Excel

Become an Excel Dashboard Expert



Dinesh Natarajan Mohan

indzara.com

[courses.indzara.com](https://courses.indzara.com)

## Table of Contents

|                                      |    |
|--------------------------------------|----|
| CHAPTER 1 - Introduction .....       | 3  |
| Overview .....                       | 3  |
| What you will learn about Excel..... | 4  |
| Requirements for Course .....        | 4  |
| About the Instructor/Author.....     | 5  |
| Template Scope .....                 | 6  |
| CHAPTER 2 – Setting up Inputs .....  | 7  |
| 2.1 Types of Vacation .....          | 7  |
| 2.2 Weekends.....                    | 17 |
| 2.3 Company Holidays.....            | 25 |
| 2.4 Employee Data .....              | 27 |
| 2.5 Employee Vacation Data .....     | 30 |

## 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.

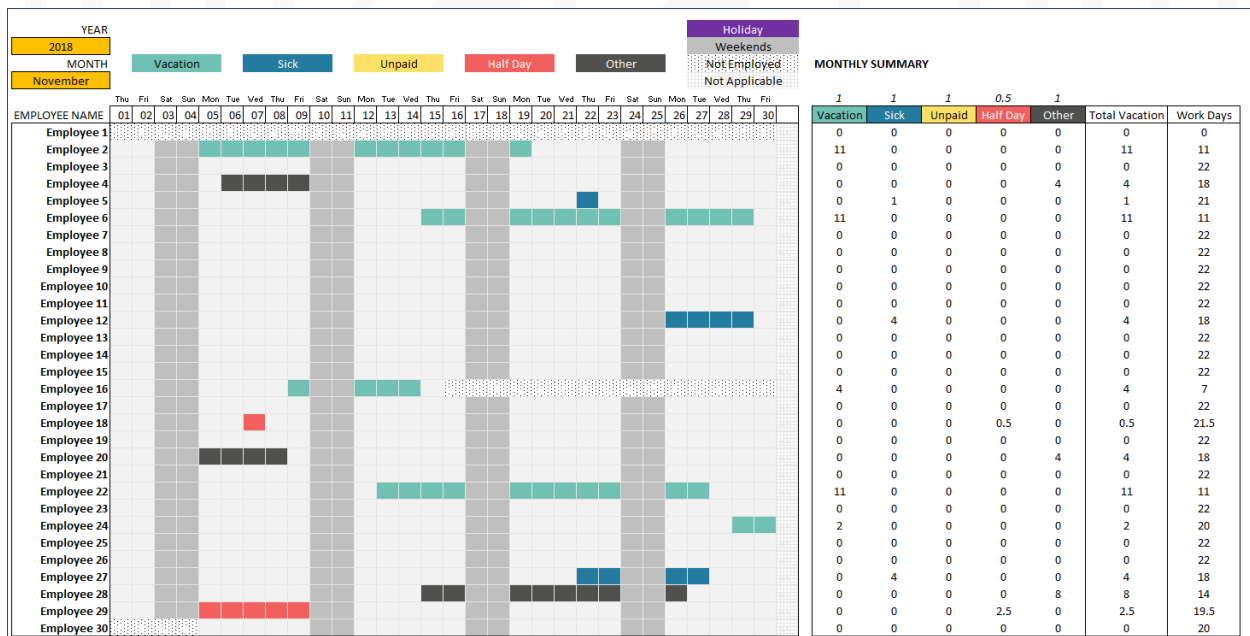
I will start with a blank Excel workbook and build the various components step by step. Not a single step will be left out.

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.

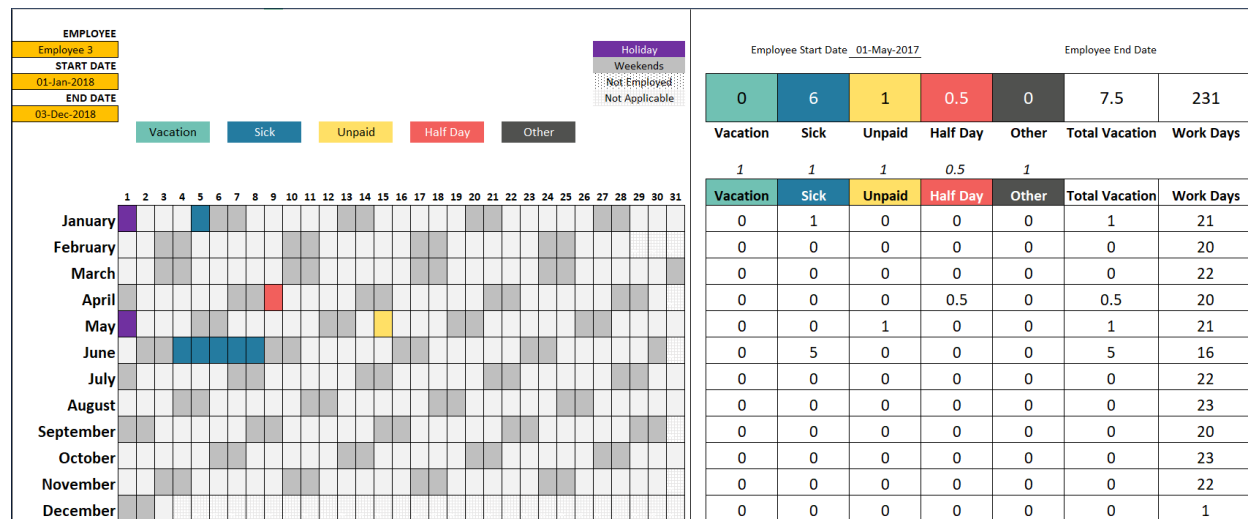
You will be on your way to become an Excel Dashboard Expert.

### Team Dashboard Screenshot



## Create a Vacation and Attendance Tracker Dashboard in Excel

### 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 [Useful Excel for Beginners](https://courses.indzara.com) course first.

## Create a Vacation and Attendance Tracker Dashboard in Excel

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 [Excel Online](#) (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. [LinkedIn Profile](#)

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 [YouTube Channel](#) 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
  - 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
  - Should be easy to customize colors to suit preferences
  - Allow companies to choose which days are weekends/holidays
  - 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
  - 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.

---

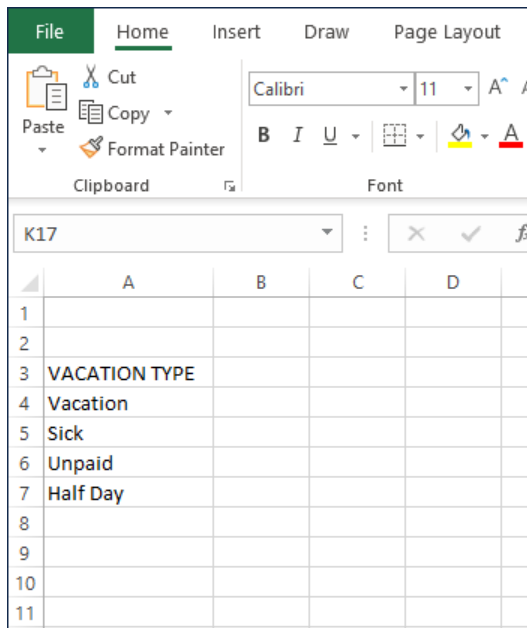


## CHAPTER 2 – Setting up Inputs

### 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.



The screenshot shows the Microsoft Excel interface with the 'Home' tab selected. The ribbon includes 'Clipboard' (Cut, Copy, Paste, Format Painter) and 'Font' (Calibri, 11, Bold, Italic, Underline, Text Color, Background Color). The worksheet grid shows the following data:

|    | A             | B | C | D |
|----|---------------|---|---|---|
| 1  |               |   |   |   |
| 2  |               |   |   |   |
| 3  | VACATION TYPE |   |   |   |
| 4  | Vacation      |   |   |   |
| 5  | Sick          |   |   |   |
| 6  | Unpaid        |   |   |   |
| 7  | Half Day      |   |   |   |
| 8  |               |   |   |   |
| 9  |               |   |   |   |
| 10 |               |   |   |   |
| 11 |               |   |   |   |

Convert the list to a Table.



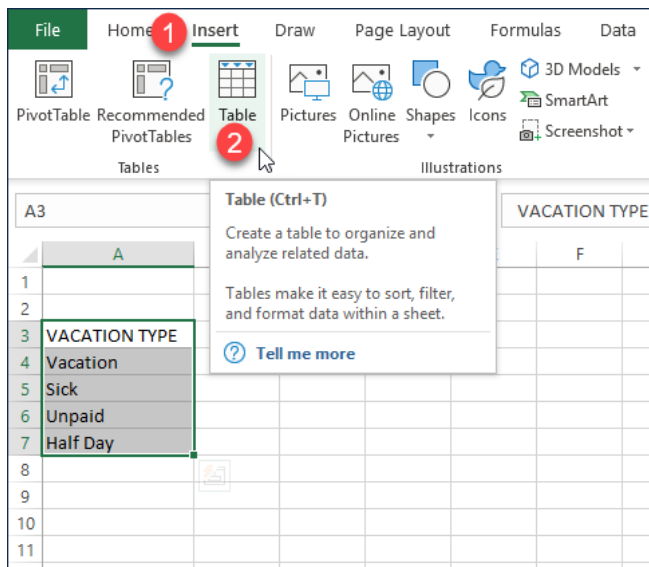
Excel Tables is one of the absolute essentials to learn.

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.



## Create a Vacation and Attendance Tracker Dashboard in Excel

Select cells and press Ctrl+T.



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

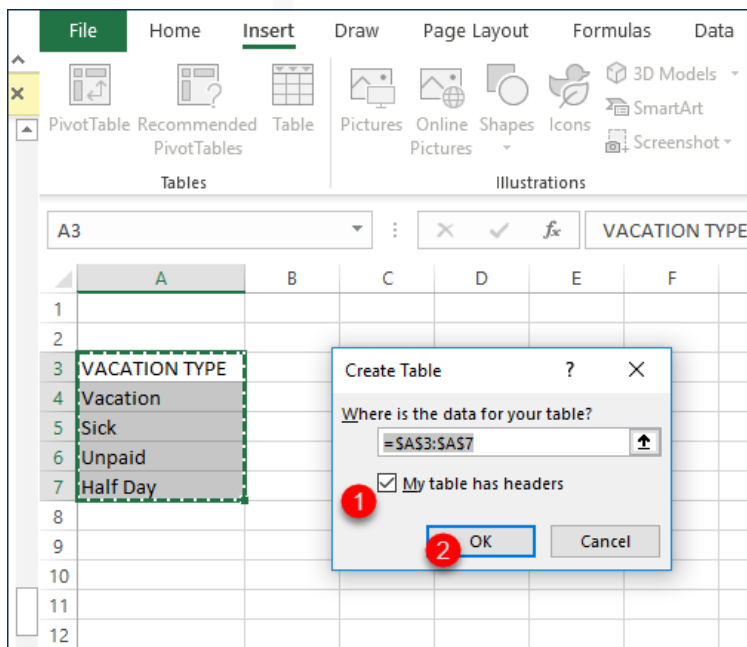


Table is now created.

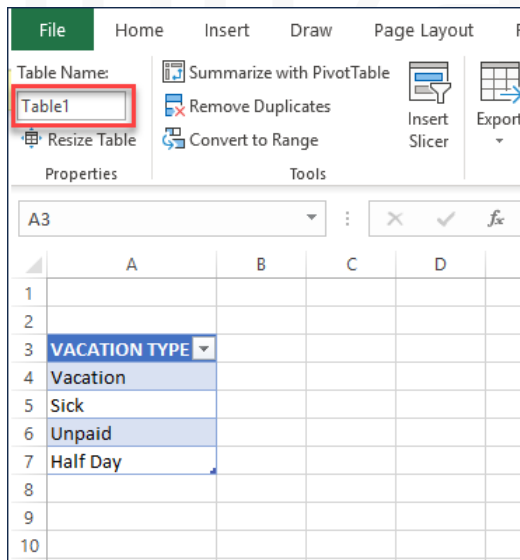


---

### ***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**.

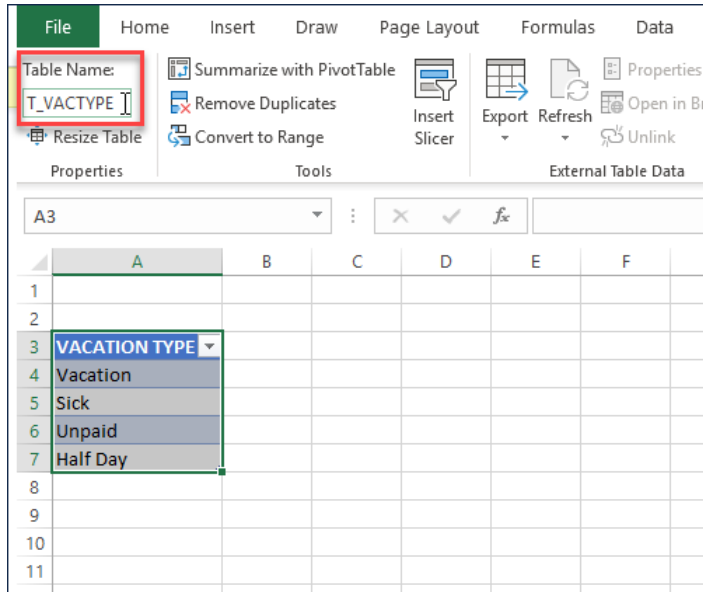


The screenshot shows the Microsoft Excel interface. The 'Table Name' box in the 'Table Tools' ribbon is highlighted with a red rectangle and contains the text 'Table1'. Below the ribbon, a table is displayed with columns A, B, C, and D. Row 3 contains a dropdown menu labeled 'VACATION TYPE'. The dropdown menu is open, showing four options: 'Vacation', 'Sick', 'Unpaid', and 'Half Day'. The table is currently empty except for the dropdown menu in row 3.

|    | A             | B | C | D |
|----|---------------|---|---|---|
| 1  |               |   |   |   |
| 2  |               |   |   |   |
| 3  | VACATION TYPE |   |   |   |
| 4  | Vacation      |   |   |   |
| 5  | Sick          |   |   |   |
| 6  | Unpaid        |   |   |   |
| 7  | Half Day      |   |   |   |
| 8  |               |   |   |   |
| 9  |               |   |   |   |
| 10 |               |   |   |   |

## Create a Vacation and Attendance Tracker Dashboard in Excel

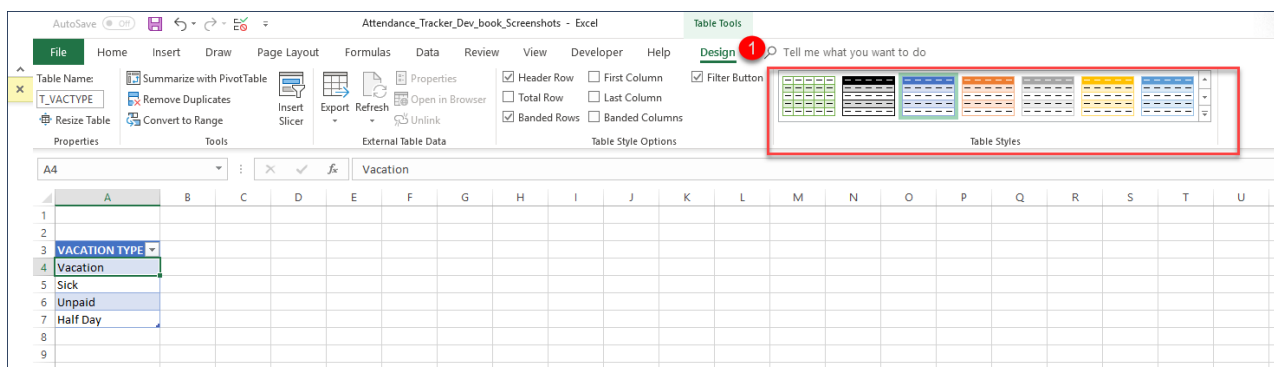
Rename the table as T\_VACTYPE by typing directly in the Table Name box and pressing Enter.



**Tip:** Naming tables allows to easily recognize which table we are referring to and makes writing and understanding formulas so much easier.

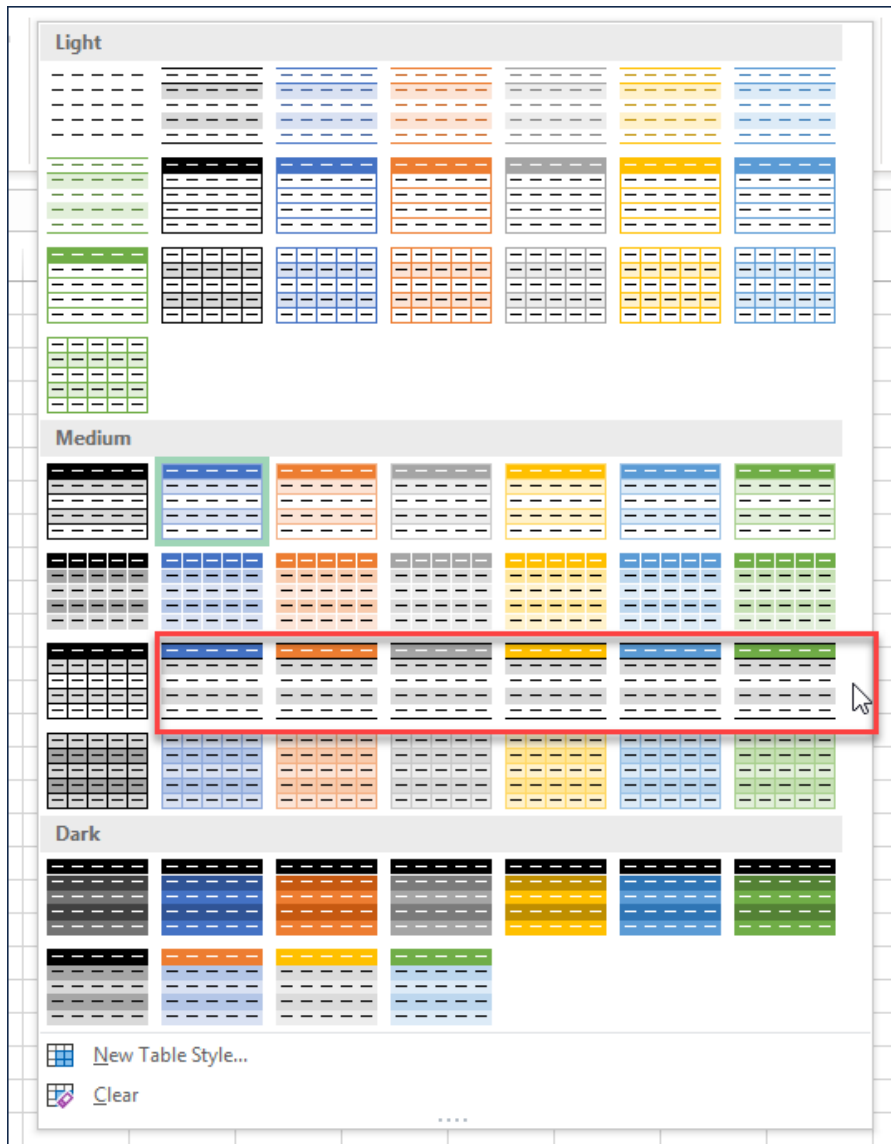


The appearance or the design of the table can be changed. Excel provides many options to choose colors, borders and fonts as desired by the user. We can change them from the **Table Styles** in the **Table Tools – Design** ribbon. These options appear only we have selected a cell inside the Table.



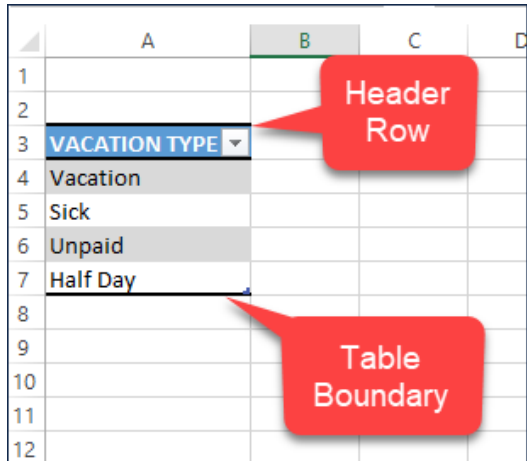
## Table Styles

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.



## Create a Vacation and Attendance Tracker Dashboard in Excel

Now, our table appears like below.



The image shows an Excel table with the following structure:

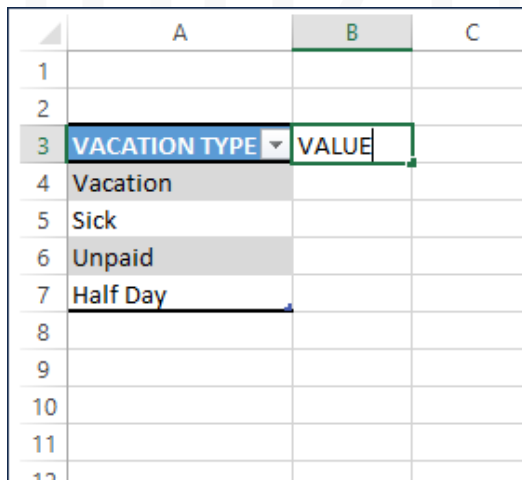
|    | A             | B | C | D |
|----|---------------|---|---|---|
| 1  |               |   |   |   |
| 2  |               |   |   |   |
| 3  | VACATION TYPE |   |   |   |
| 4  | Vacation      |   |   |   |
| 5  | Sick          |   |   |   |
| 6  | Unpaid        |   |   |   |
| 7  | Half Day      |   |   |   |
| 8  |               |   |   |   |
| 9  |               |   |   |   |
| 10 |               |   |   |   |
| 11 |               |   |   |   |
| 12 |               |   |   |   |

Two red callout boxes are present: one pointing to row 3 labeled "Header Row" and another pointing to row 7 labeled "Table Boundary".

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.



The image shows the same Excel table as before, but with a new column added. The structure is now:

|    | A             | B     | C |
|----|---------------|-------|---|
| 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.

## Create a Vacation and Attendance Tracker Dashboard in Excel

|    | A             | B     | C | D |
|----|---------------|-------|---|---|
| 1  |               |       |   |   |
| 2  |               |       |   |   |
| 3  | VACATION TYPE | VALUE |   |   |
| 4  | Vacation      |       |   |   |
| 5  | Sick          |       |   |   |
| 6  | Unpaid        |       |   |   |
| 7  | Half Day      |       |   |   |
| 8  |               |       |   |   |
| 9  |               |       |   |   |
| 10 |               |       |   |   |
| 11 |               |       |   |   |
| 12 |               |       |   |   |
| 13 |               |       |   |   |
| 14 |               |       |   |   |
| 15 |               |       |   |   |

Now, type the values in that column.

|    | A             | B     | C | 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 |               |       |   |   |



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.



## Create a Vacation and Attendance Tracker Dashboard in Excel

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.

|    | A             | B     | C | D | E | F |
|----|---------------|-------|---|---|---|---|
| 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 |               |       |   |   |   |   |
| 16 |               |       |   |   |   |   |
| 17 |               |       |   |   |   |   |
| 18 |               |       |   |   |   |   |
| 19 |               |       |   |   |   |   |
| 20 |               |       |   |   |   |   |
| 21 |               |       |   |   |   |   |

If row 7 is the last row of Table

Entering in row 8 will automatically add to table

Entering in any row after row 8 will not add to table

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             | B     | 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.

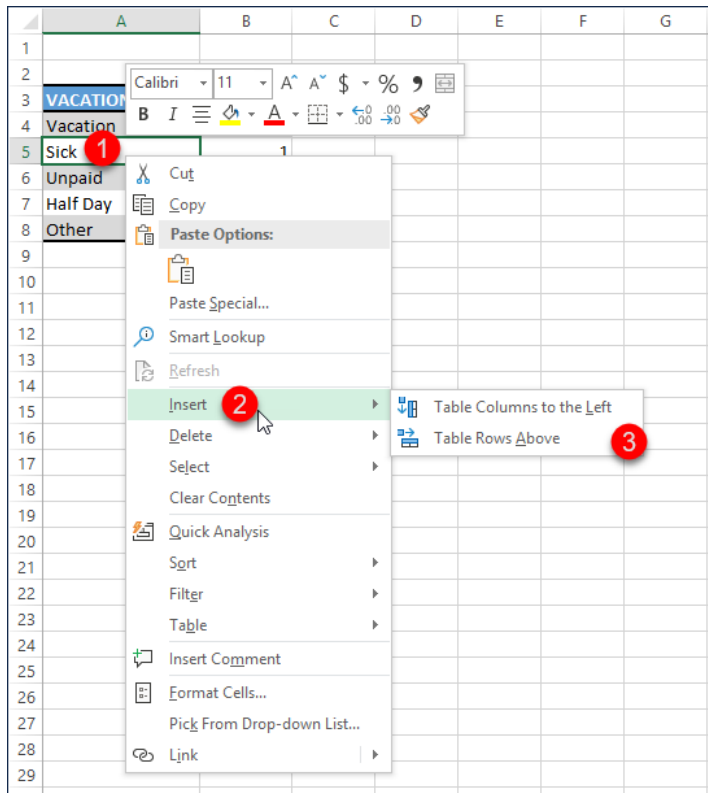
## Create a Vacation and Attendance Tracker Dashboard in Excel

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

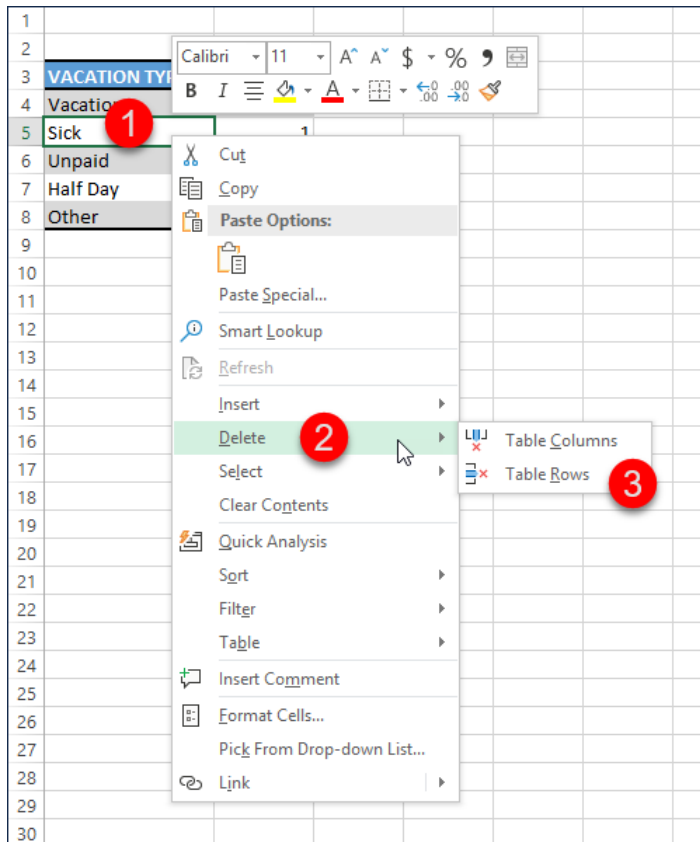
### Inserting and Deleting data from Table

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



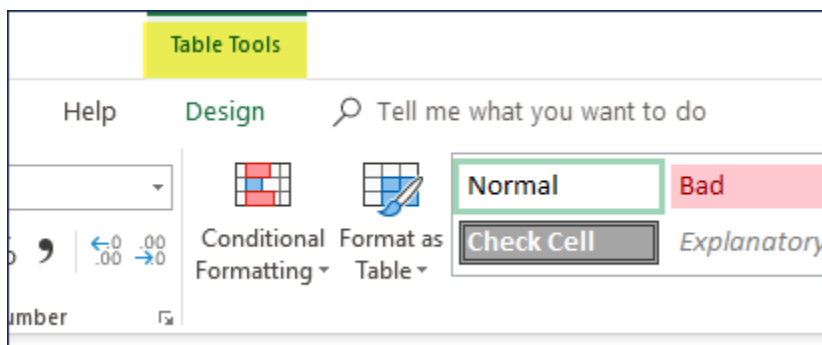
## Create a Vacation and Attendance Tracker Dashboard in Excel

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**.





## 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.

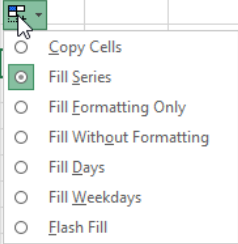
Let's type Day and Sunday.

|    | A               | B       | C | D | E | F | G |
|----|-----------------|---------|---|---|---|---|---|
| 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 |                 |         |   |   |   |   |   |

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  
Wednesday  
Thursday  
Friday  
Saturday



The screenshot shows the Flash Fill menu in Excel, which appears after clicking the Flash Fill icon (a green square with a white 'E') in the 'Data' tab. The menu is a white box with a green border and a green header bar. It contains seven options, each with a radio button: 'Copy Cells' (unselected), 'Fill Series' (selected, indicated by a green circle around the radio button), 'Fill Formatting Only' (unselected), 'Fill Without Formatting' (unselected), 'Fill Days' (unselected), 'Fill Weekdays' (unselected), and 'Flash Fill' (unselected). The 'Flash Fill' option is at the bottom of the menu.

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

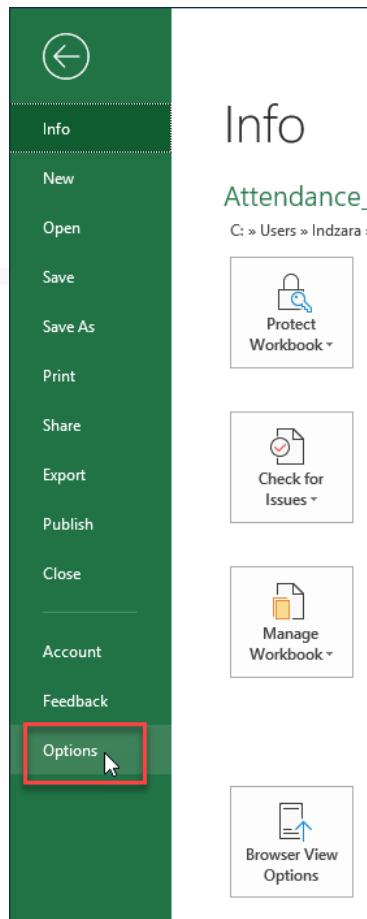
## Create a Vacation and Attendance Tracker Dashboard in Excel



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.

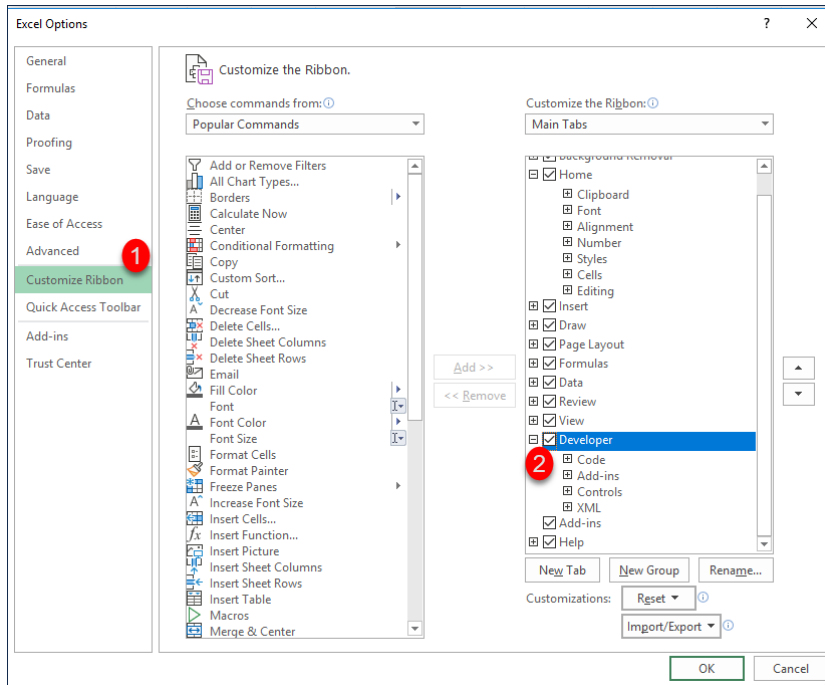


Click on File → Options.



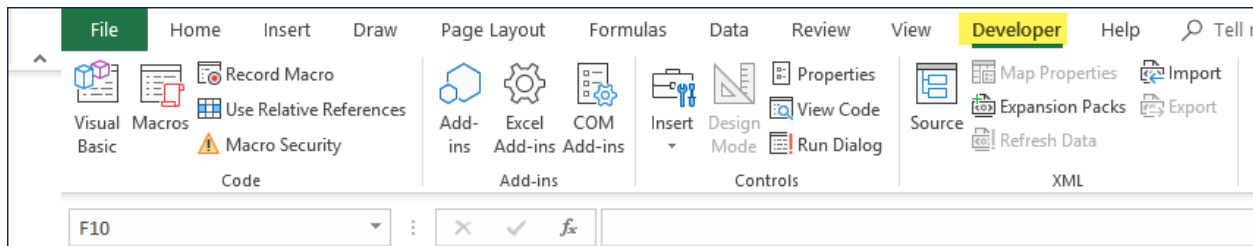
## Create a Vacation and Attendance Tracker Dashboard in Excel

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

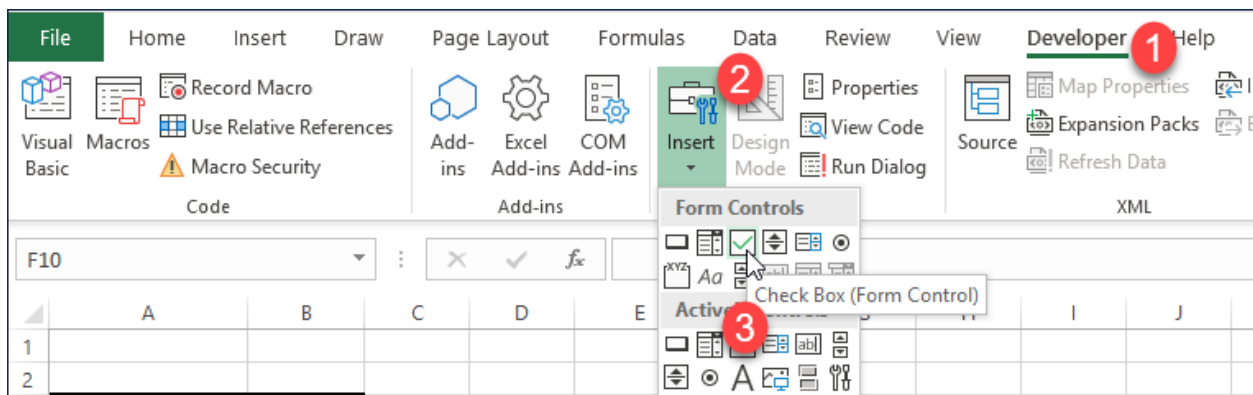


Press OK.

Now Developer ribbon appears.



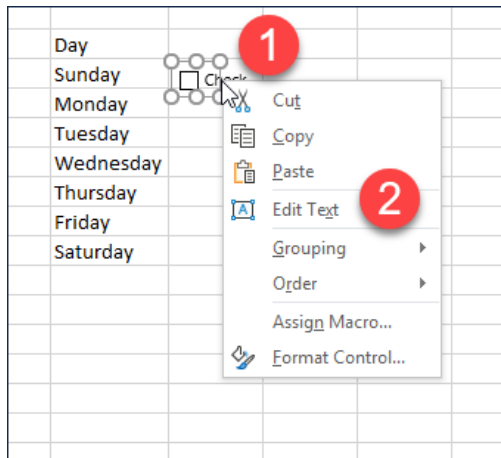
Insert **Check Box** control.



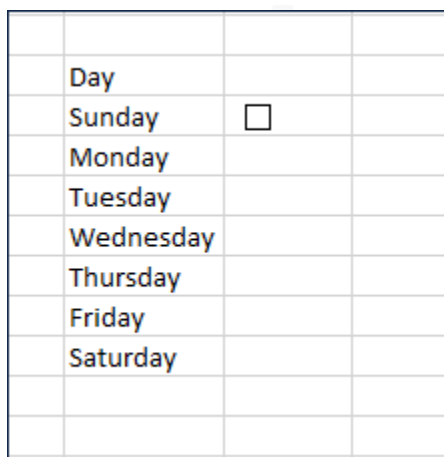
## Create a Vacation and Attendance Tracker Dashboard in Excel

Then, click where you want the box to be and drag to create the check box.

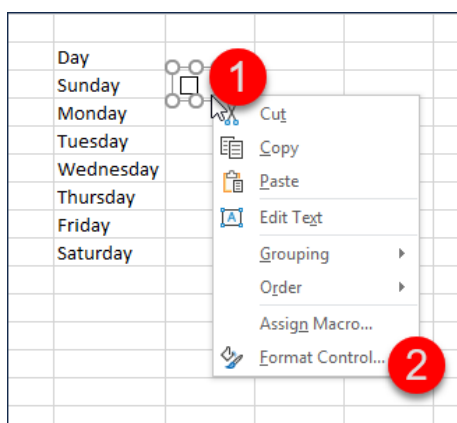
Right click on the check box and then select **Edit Text**.



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.



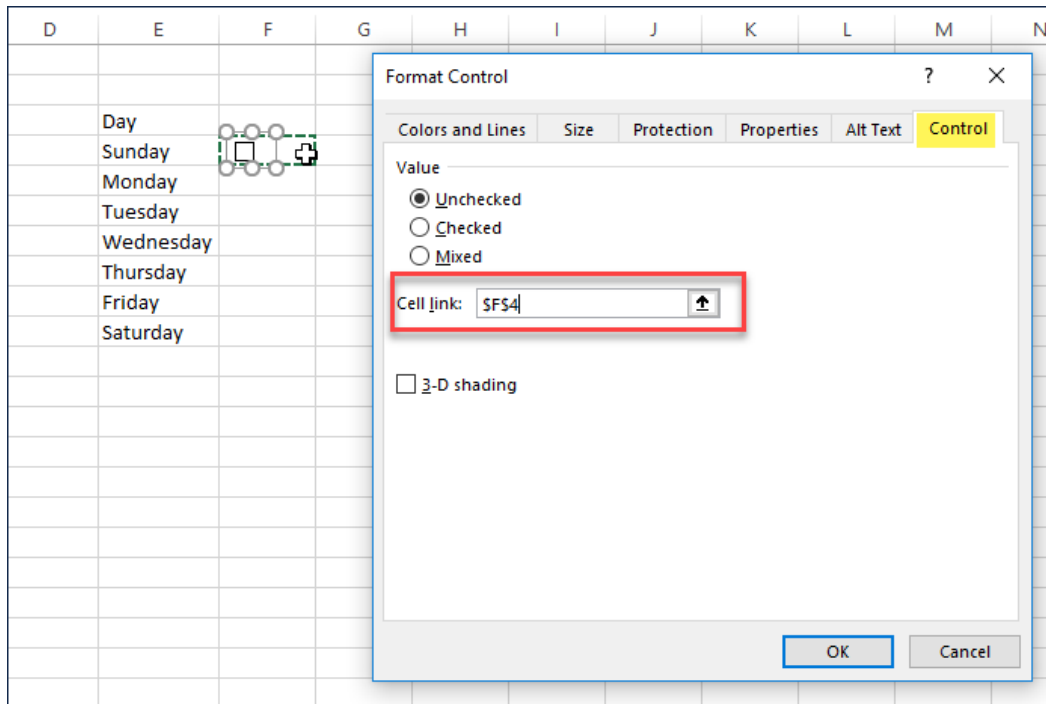
Right Click and select Format Control.



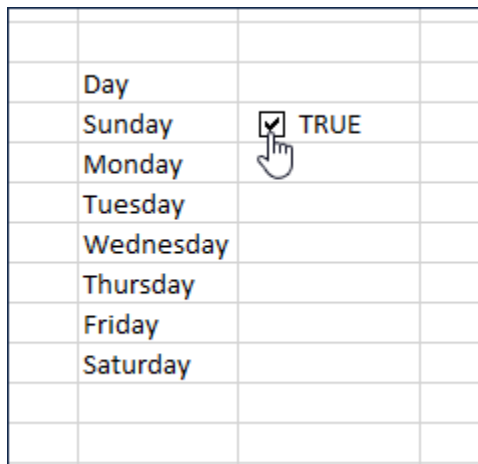
## Create a Vacation and Attendance Tracker Dashboard in Excel

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.



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



## Create a Vacation and Attendance Tracker Dashboard in Excel


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

|  |           |                                |  |
|--|-----------|--------------------------------|--|
|  |           |                                |  |
|  | Day       |                                |  |
|  | Sunday    | <input type="checkbox"/> FALSE |  |
|  | Monday    |                                |  |
|  | 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.

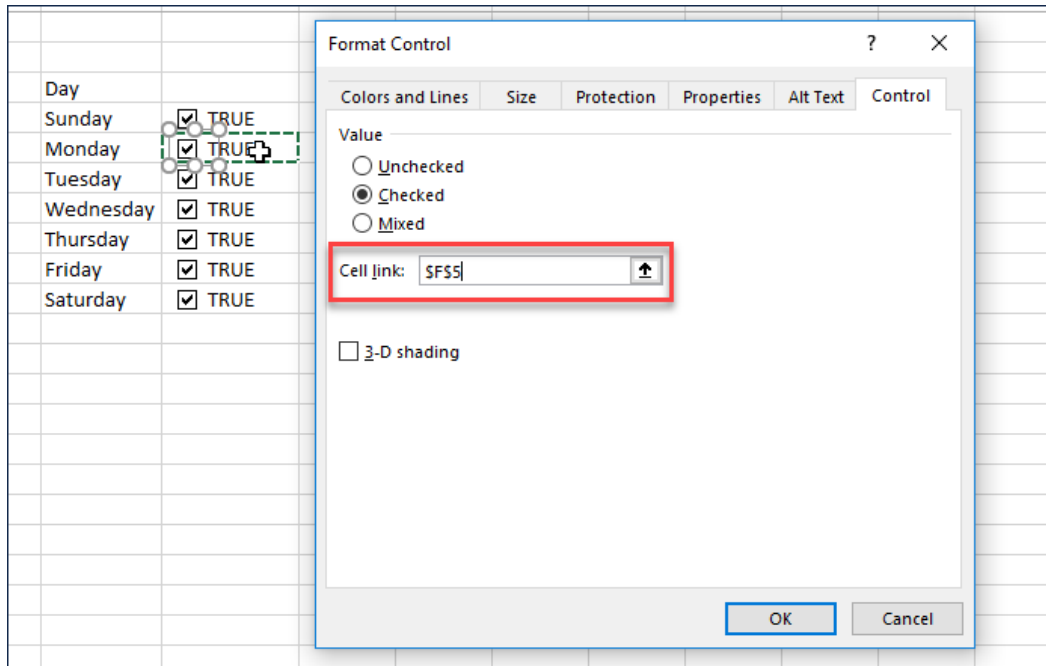
- Select cell F4 and press Ctrl+C to copy.
- Now, select cells F5 to F10.
- Press Ctrl+V to Paste

|  |           |  |  |  |
|--|-----------|--|--|--|
|  |           |  |  |  |
|  | Day       |  |  |  |
|  | Sunday    | <input checked="" type="checkbox"/> TRUE |  |  |
|  | Monday    | <input checked="" type="checkbox"/> TRUE |  |  |
|  | Tuesday   | <input checked="" type="checkbox"/> TRUE |  |  |
|  | Wednesday | <input checked="" type="checkbox"/> TRUE |  |  |
|  | Thursday  | <input checked="" type="checkbox"/> TRUE |  |  |
|  | Friday    | <input checked="" type="checkbox"/> TRUE |  |  |
|  | Saturday  | <input checked="" type="checkbox"/> TRUE |  |  |
|  |           |  |  (Ctrl) ▾ |  |

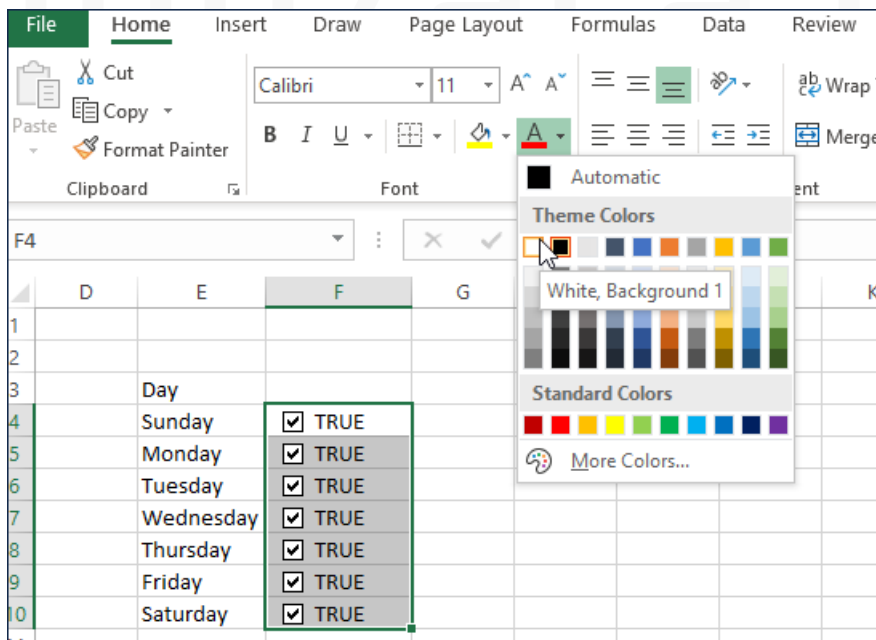
All the new checkboxes will also be pointing to the same cell F4.

## Create a Vacation and Attendance Tracker Dashboard in Excel

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.



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.

## Create a Vacation and Attendance Tracker Dashboard in Excel

We will have the following appearance which is much cleaner.

|  |           |                                     |
|--|-----------|-------------------------------------|
|  | Day       |                                     |
|  | Sunday    | <input checked="" type="checkbox"/> |
|  | Monday    | <input type="checkbox"/>            |
|  | Tuesday   | <input type="checkbox"/>            |
|  | Wednesday | <input type="checkbox"/>            |
|  | Thursday  | <input type="checkbox"/>            |
|  | Friday    | <input type="checkbox"/>            |
|  | Saturday  | <input checked="" type="checkbox"/> |
|  |           |                                     |

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.

|    |               |       |   |   |           |                                     |   |
|----|---------------|-------|---|---|-----------|-------------------------------------|---|
|    | A             | B     | C | D | E         | F                                   | G |
| 1  |               |       |   |   |           |                                     |   |
| 2  |               |       |   |   |           |                                     |   |
| 3  | VACATION TYPE | VALUE |   |   | Day       |                                     |   |
| 4  | Vacation      | 1     |   |   | Sunday    | <input checked="" type="checkbox"/> |   |
| 5  | Sick          | 1     |   |   | Monday    | <input type="checkbox"/>            |   |
| 6  | Unpaid        | 1     |   |   | Tuesday   | <input type="checkbox"/>            |   |
| 7  | Half Day      | 0.5   |   |   | Wednesday | <input type="checkbox"/>            |   |
| 8  | Other         | 1     |   |   | Thursday  | <input type="checkbox"/>            |   |
| 9  |               |       |   |   | Friday    | <input type="checkbox"/>            |   |
| 10 |               |       |   |   | Saturday  | <input checked="" type="checkbox"/> |   |
| 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 ranges 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.

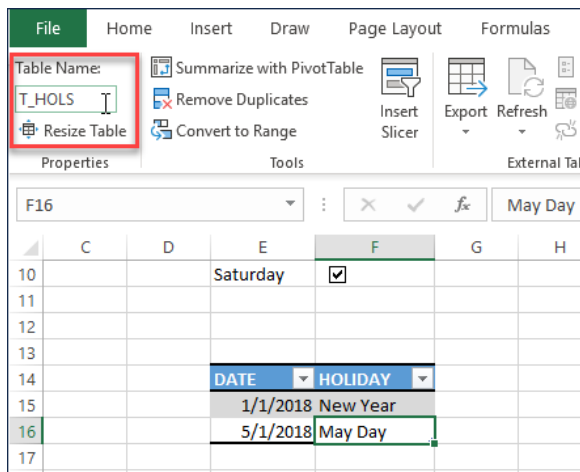
[illegible]

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

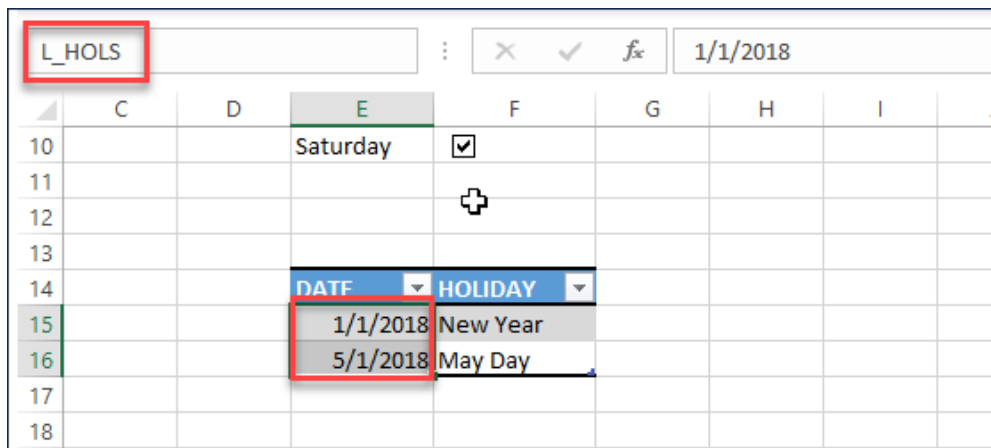
| DATE     | HOLIDAY  |
|----------|----------|
| 1/1/2018 | New Year |
| 5/1/2018 | May Day  |

## Create a Vacation and Attendance Tracker Dashboard in Excel

Rename the table as T\_HOLS.

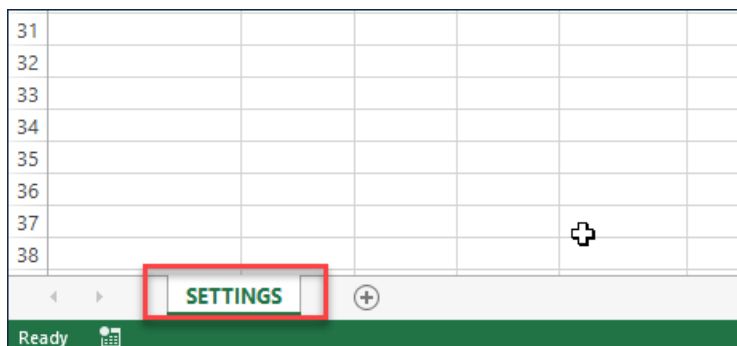


Select the dates alone and name the list as L\_HOLS.



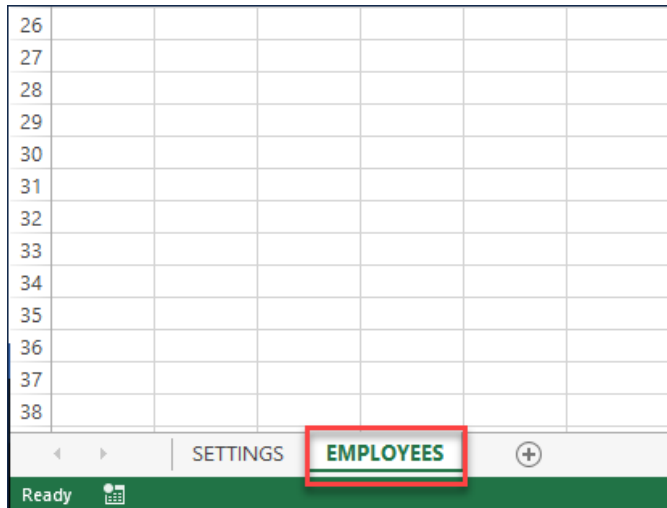
This will be handy when we write formulas later.

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



## 2.4 Employee Data

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



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

|    | A             | B          | C         | 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.

## Create a Vacation and Attendance Tracker Dashboard in Excel

|    | A               | B            | C          | 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.

Select cells.  
Press Ctrl+1 to open the  
'Format Cells' dialog box

**Format Cells**

Category: **Date**

Sample: 1/6/2015

Type: 3/14/2012

\*Wednesday, March 14, 2012

2012-03-14

3/14

3/14/12

03/14/12

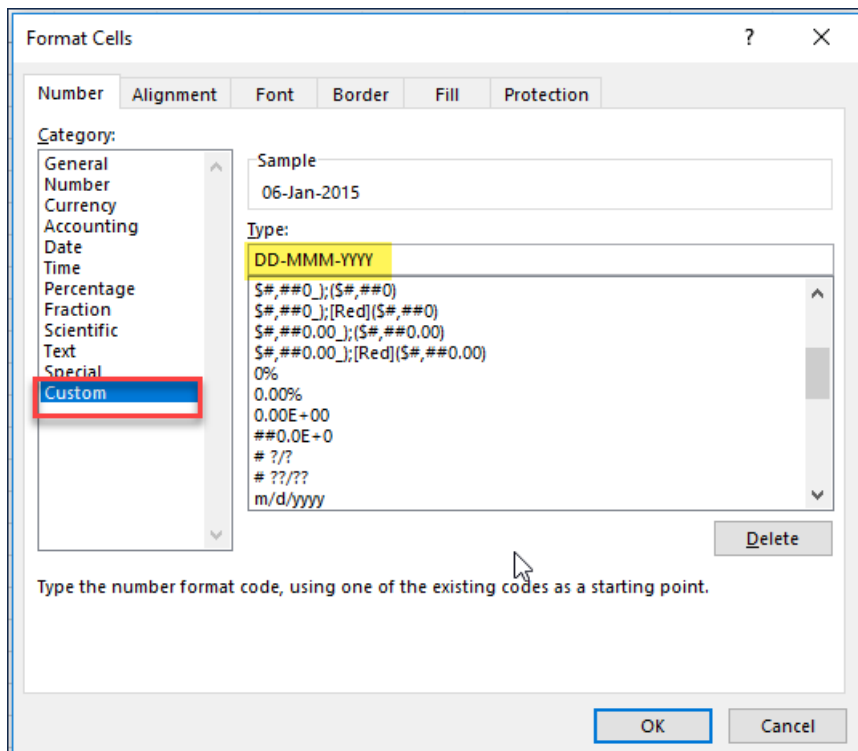
14-Mar

Locale (location): English (United States)

OK Cancel

Date formats display date and time serial numbers as date values. Date formats that begin with an asterisk (\*) respond to changes in regional date and time settings that are specified for the operating system. Formats without an asterisk are not affected by operating system settings.

## Create a Vacation and Attendance Tracker Dashboard in Excel



Once we apply any date format, the display will change. Example: As shown below.

|   | A             | B           | C           | 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 |               |             |             |            |

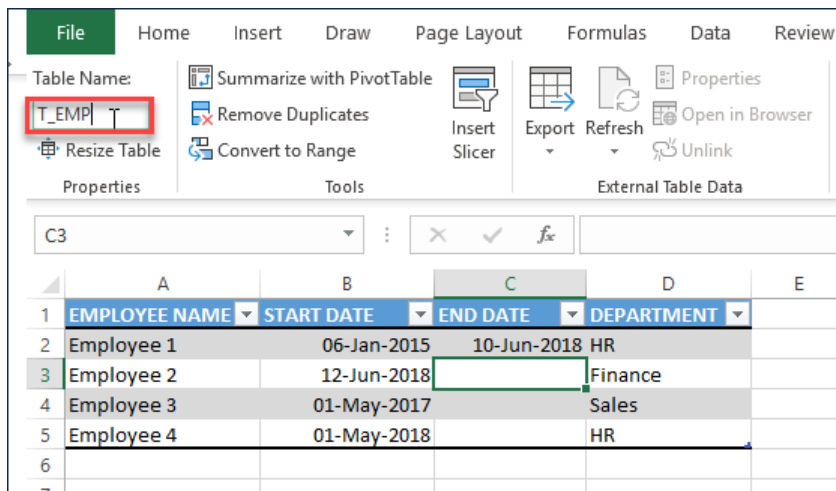


If you are developing a template for global audience, I suggest showing the month in name and not number. As some countries use DD/MM/YYYY format and some use MM/DD/YYYY, it is possible that the dates can be misinterpreted. Please use DD-MMM-YYYY format.

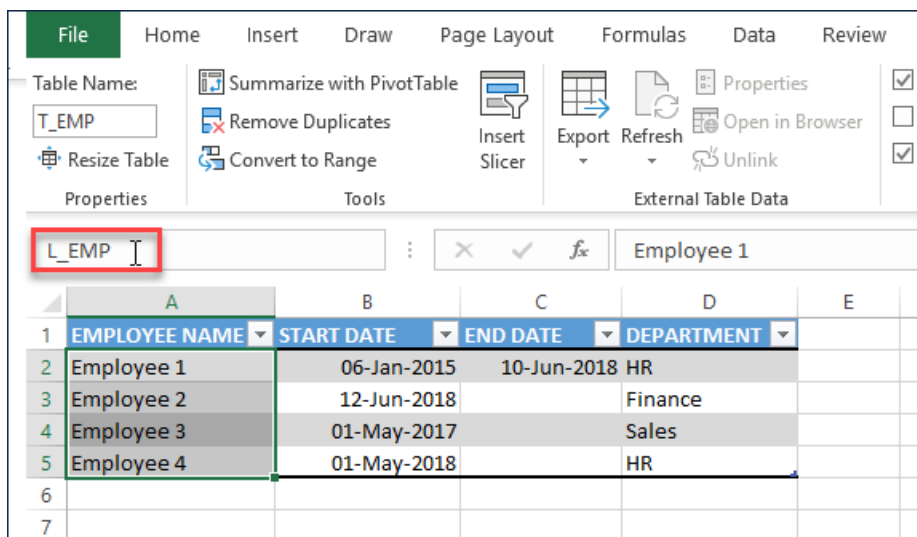


## Create a Vacation and Attendance Tracker Dashboard in Excel

Name the table T\_EMP.

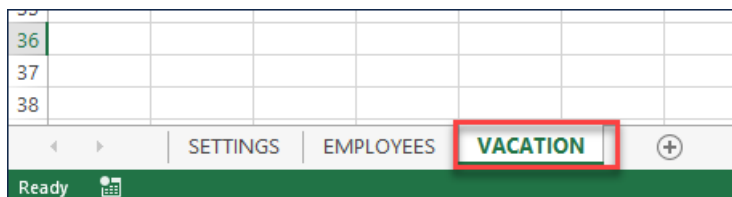


Name the list of employee names L\_EMP.



### 2.5 Employee Vacation Data

Create a new sheet and name it VACATION.



## Create a Vacation and Attendance Tracker Dashboard in Excel

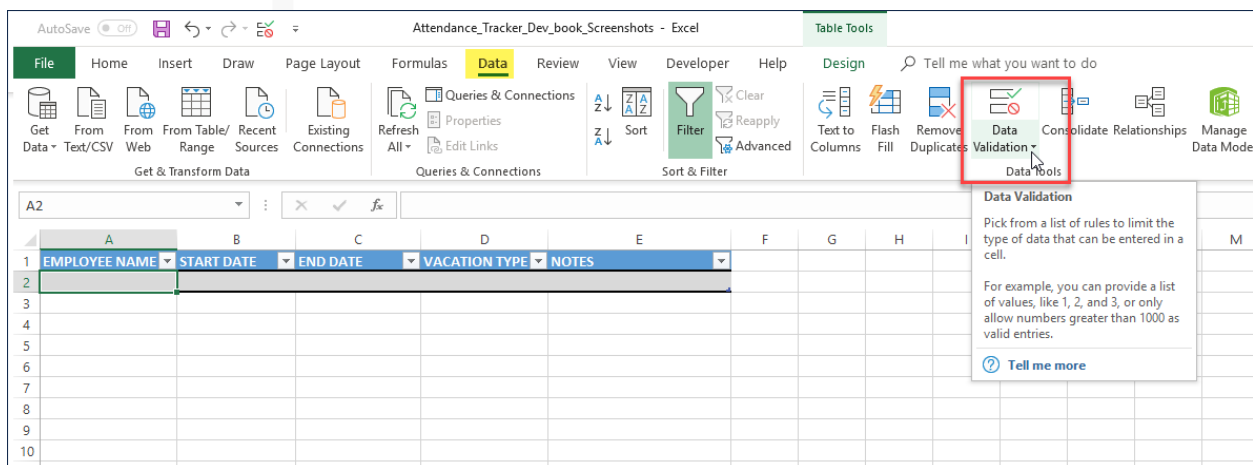
Enter the column headers and convert to a table.

|   | A             | B          | C        | 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.

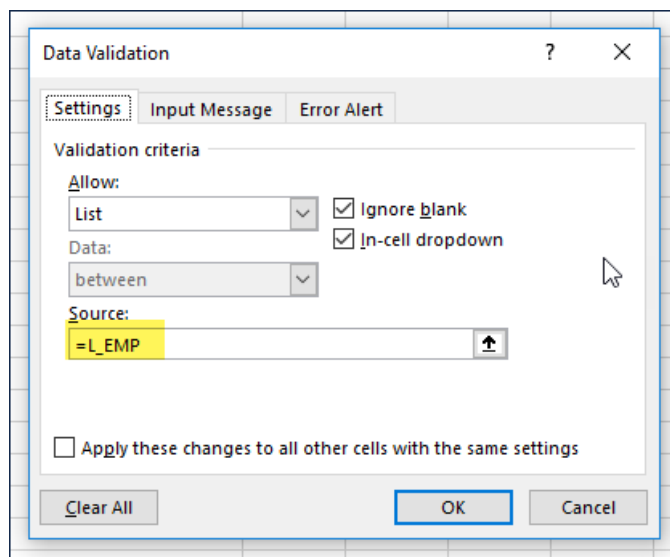
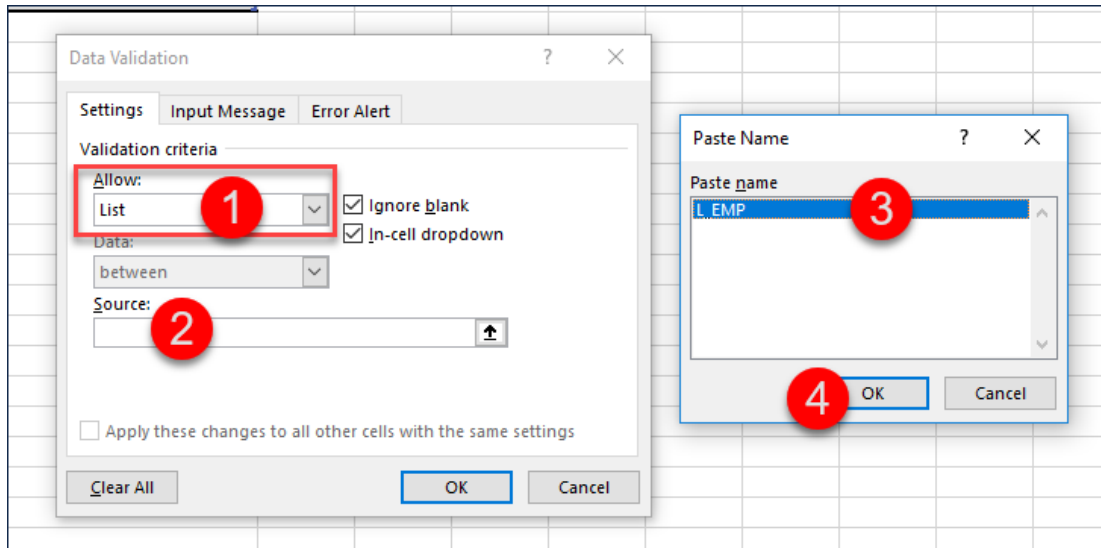
Similarly, Vacation Type entered in column D should be from one of the Vacation types in Settings sheet.

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



## Create a Vacation and Attendance Tracker Dashboard in Excel

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).



Press OK.

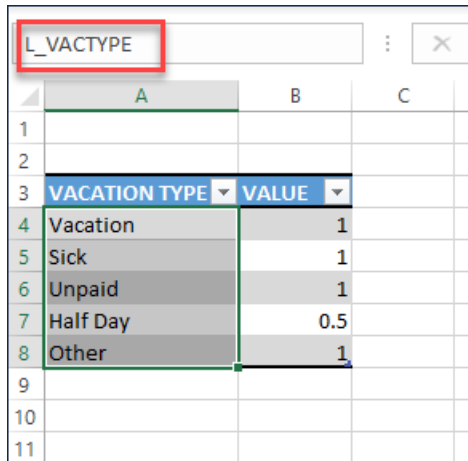
The drop-down list will now appear.

|   | A             | B          | C        | D             |       |
|---|---------------|------------|----------|---------------|-------|
| 1 | EMPLOYEE NAME | START DATE | END DATE | VACATION TYPE | NOTES |
| 2 |               |            |          |               |       |
| 3 | Employee 1    |            |          |               |       |
| 4 | Employee 2    |            |          |               |       |
| 5 | Employee 3    |            |          |               |       |
| 6 | Employee 4    |            |          |               |       |
| 7 |               |            |          |               |       |
| 8 |               |            |          |               |       |



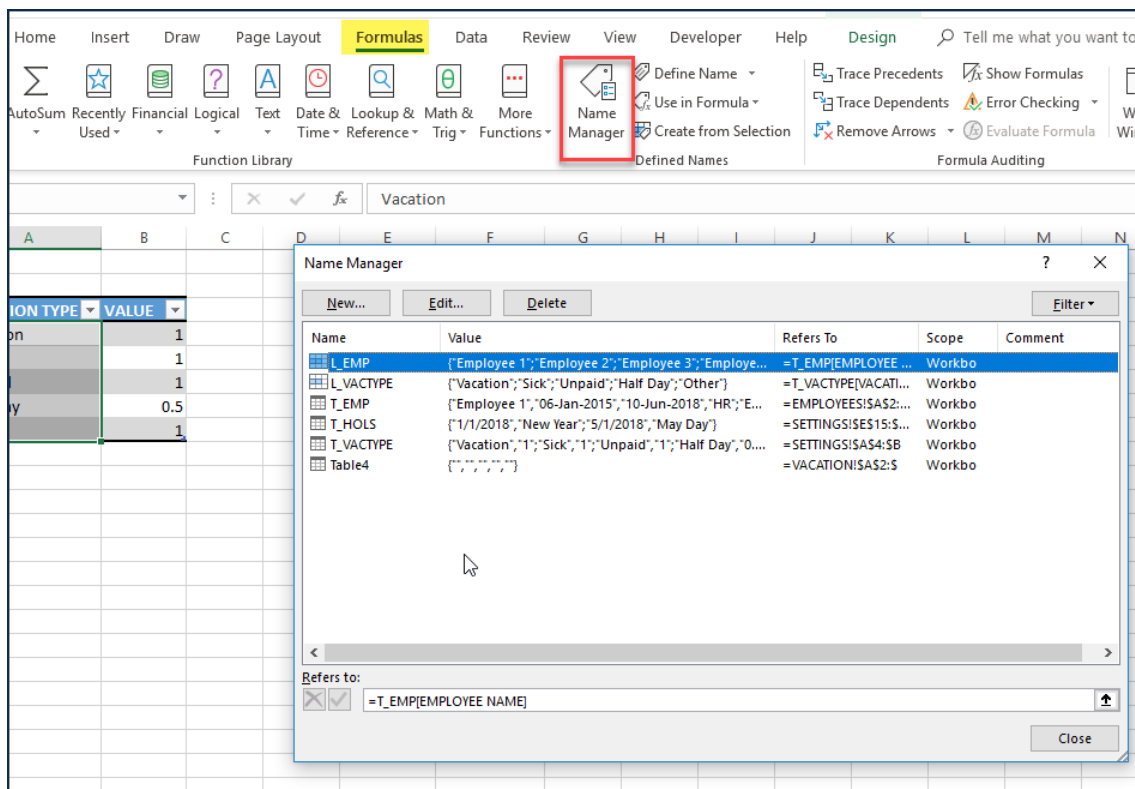
## Create a Vacation and Attendance Tracker Dashboard in Excel

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.



| VACATION TYPE | VALUE |
|---------------|-------|
| Vacation      | 1     |
| Sick          | 1     |
| Unpaid        | 1     |
| Half Day      | 0.5   |
| Other         | 1     |

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



| Name      | Value  | Refers To              | Scope  | Comment |
|-----------|--|------------------------|--------|---------|
| L_EMP     | {'Employee 1';'Employee 2';'Employee 3';'Employee ...    | =T_EMP[EMPLOYEE ...    | Workbo |         |
| L_VACTYPE | {'Vacation';'Sick';'Unpaid';'Half Day';'Other'}          | =T_VACTYPE[VACATI...   | Workbo |         |
| T_EMP     | {'Employee 1';'06-Jan-2015';'10-Jun-2018';'HR';'E...     | =EMPLOYEES!\$A\$2:...  | Workbo |         |
| T_HOLS    | {'1/1/2018';'New Year';'5/1/2018';'May Day'}             | =SETTINGS!\$E\$15:S... | Workbo |         |
| T_VACTYPE | {'Vacation','1';'Sick','1';'Unpaid','1';'Half Day','0... | =SETTINGS!\$A\$4:\$B   | Workbo |         |
| Table4    | {'...'   | =VACATION!\$A\$2:\$    | Workbo |         |

## Create a Vacation and Attendance Tracker Dashboard in Excel

Implement the drop-down list as explained earlier.

| A             | B          | C        | D   | E     |
|---------------|------------|----------|---|-------|
| EMPLOYEE NAME | START DATE | END DATE | VACATION TYPE                                   | NOTES |
|               |            |          | Vacation<br>Sick<br>Unpaid<br>Half Day<br>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.

|              |                           |               |                     |               |                           |                 |                     |                |
|--------------|---------------------------|---------------|---------------------|---------------|---------------------------|-----------------|---------------------|----------------|
| Table Name:  | Summarize with PivotTable | Insert Slicer | Export              | Refresh       | Unlink                    | Properties      | Header Row          | First Column   |
| T_VAC        | Remove Duplicates         |               |                     |               |                           | Open in Browser | Total Row           | Last Column    |
| Resize Table | Convert to Range          |               |                     |               |                           | Unlink          | Banded Rows         | Banded Columns |
| Properties   | Tools                     |               | External Table Data |               |                           |                 | Table Style Options |                |
| B3           |                           |               |                     |               |                           |                 |                     |                |
|              | A                         | B             | C                   | D             | E                         | F               |                     |                |
| 1            | EMPLOYEE NAME             | START DATE    | END DATE            | VACATION TYPE | NOTES                     |                 |                     |                |
| 2            | Employee 1                | 05-Jan-2018   | 10-Jan-2018         | Vacation      | Employee 3 will be backup |                 |                     |                |
| 3            | Employee 2                | 10-Jul-2018   | 11-Jul-2018         | Sick          |                           |                 |                     |                |
| 4            | Employee 3                | 05-Jun-2018   | 12-Jun-2018         | Vacation      |                           |                 |                     |                |
| 5            |                           |               |                     |               |                           |                 |                     |                |
| 6            |                           |               |                     |               |                           |                 |                     |                |
| 7            |                           |               |                     |               |                           |                 |                     |                |
| 8            |                           |               |                     |               |                           |                 |                     |                |
| 9            |                           |               |                     |               |                           |                 |                     |                |
| 10           |                           |               |                     |               |                           |                 |                     |                |

This completes our Data Input sheets.

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



Please visit

[courses.indzara.com](https://courses.indzara.com)

for the complete e-book  
& video course.

