Awesome company

DASHBOARD ON TRAINING PERFORMANCE

USER'S MANUAL

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SCOPE OF THE DASHBOARD

This dashboard aims to facilitate the visualization and gathering of data on employee's training performance. It allows to centralize all training-related data and to provide a clear overview of the training status of employees, to follow-up on backlogs, to anticipate on upcoming training needs, and to measure the overall training performance.

HOW TO USE THE DASHBOARD

Basic requirements: this dashboard works with any **Microsoft Excel** version, from 2011 onwards. For previous versions, some utilities may not work as expected.

PRE-STEP: GATHER THE DATA

The dashboard uses 4 datasets:

1. Employee details data contains row-wise data on employee name, id, role and onboarding date (.csv file).

Name	EmployeeID	Role	OnboardingDate
Employee1	1	Role24	5/10/2018
Employee2	2	Role25	9/2/2013
Employee3	3	Role28	11/29/2020

2. Trainings by role data contains information on the mandatory (i.e. the trainings that have to be revalidate periodically) trainings per role (.csv file).

Role	TrainingName	Frequency
Role06	Training46	3
Role07	Training01	3
Role03	Training26	2

3. Historical employee training data contains information on which courses were performed per employee and date (.csv file).

EmployeeID	Training	CompletionDate
443	Training03	6/23/2020
53	Training18	10/10/2012
451	Training48	8/9/2013

4. E-training data contains information on the performed e-learning courses per employee(.csv file).

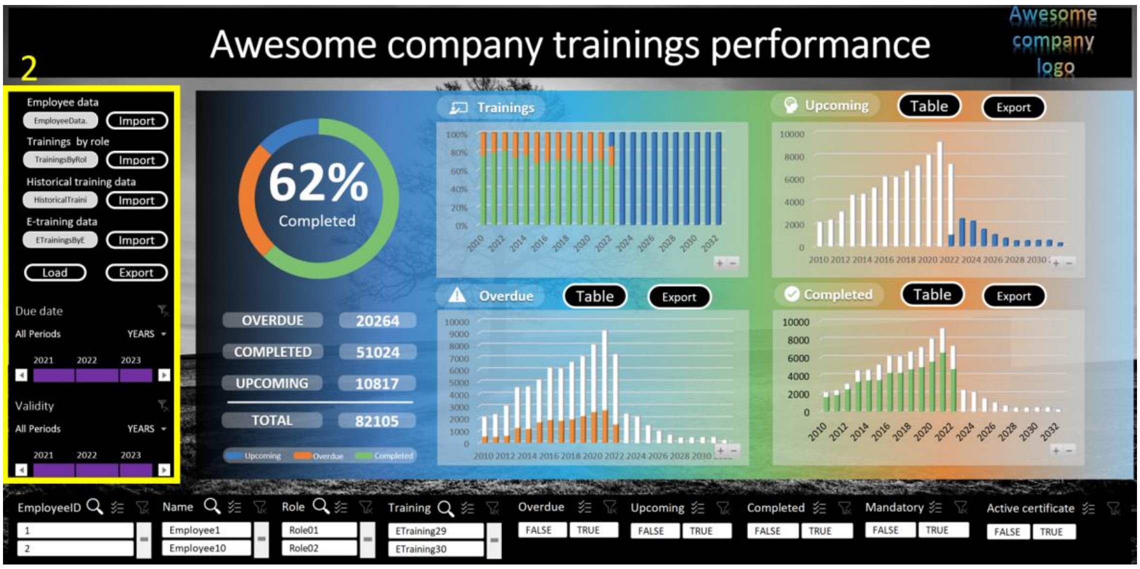
EmployeeID	ETrainingName
240	ETraining09
803	ETraining03
35	ETraining21

STEP 0: GET STARTED - DASHBOARD OUTLINE

Open the dashboard file **Training_Performance_Dashboard_X.xlsx**. In the **Dashboard** sheet, you can find the user interface. When opening the dashboard, you will see the results of the last logged-in.
The dashboard consists of 4 main sections: header, left panel, central panel, and footer.

1. The **header** displays the title and the logo. The user is not supposed to interact with this section.

2. The **left panel** contains the necessary buttons to import and load the data, as well as to export a summary table. It also contains the time-related filters.

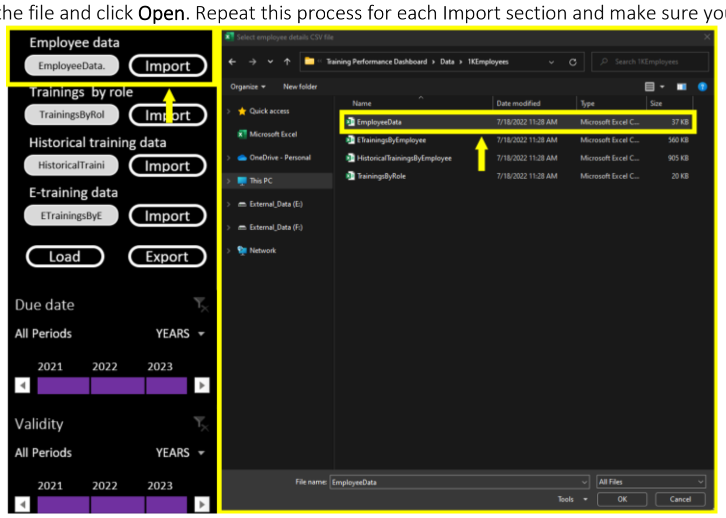


3. The **central panel** displays the summary and detailed charts and tables, and allows to export them individually.

4. The **footer** includes all filters on employee, role, and training.

STEP 1: IMPORT DATA

1. Import data by clicking the **Import** button on the left panel. A new window will open which allows you to select the correct files. By default, the Data folder will open, where the default Excel files are placed. You can import files from anywhere in your computer. Select the file and click **Open**. Repeat this process for each Import section and make sure you upload the 4 datasets.



2. Once the 4 files are imported, load the data by clicking on the **Load** button, below the Import section. A loading wheel will appear. Loading will take around 25'' for 200 employees and 1' 20'' for 5000 employees (of course the exact time could vary depending on the number of mandatory trainings, roles, E-trainings and historical number of trainings, etc.).

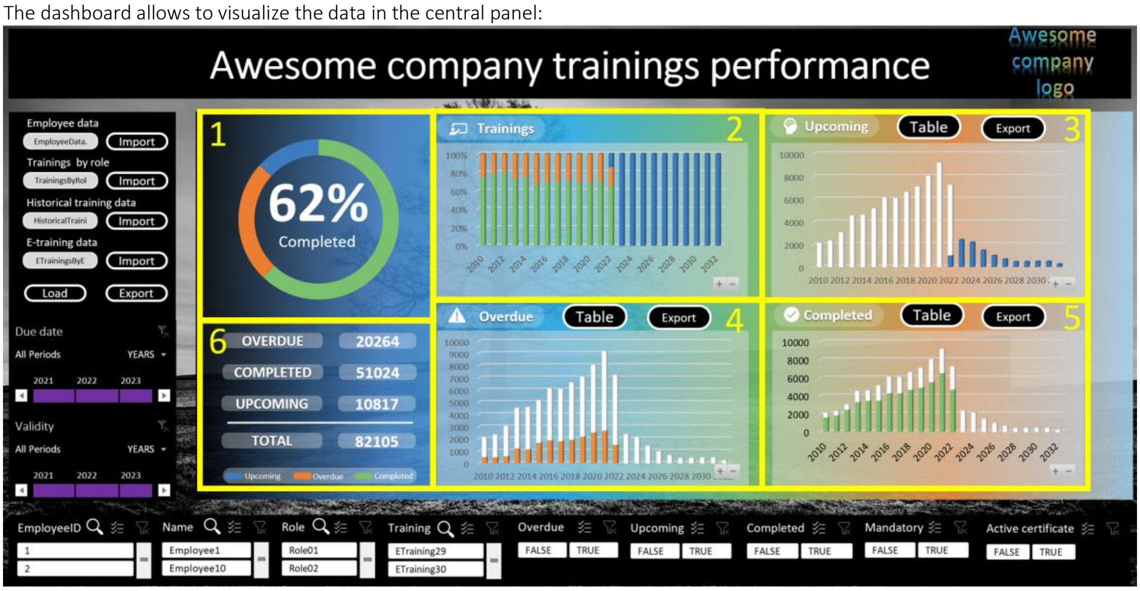
When the wheel disappears, the dashboard is ready to be used:

Once the data is loaded, you can change specific input files without having to load all 4 excel files again. Click on the desired **Import** button, select the new file, and click on **Load** again.

For more information on the dashboard outline see **Step 0: Get started - dashboard outline**.

STEP 2: VISUALIZE

The dashboard allows to visualize the data in the central panel:



1. Percentage donut
2. All trainings
3. Upcoming trainings
4. Overdue trainings
5. Completed trainings
6. Summary of trainings

The overdue, completed and upcoming trainings are color-coded as orange, green, and blue, respectively. The results can be displayed as:

1. Charts, by clicking on the **Chart** button (shown above)
2. Tables, by clicking on the **Table** button (shown below)

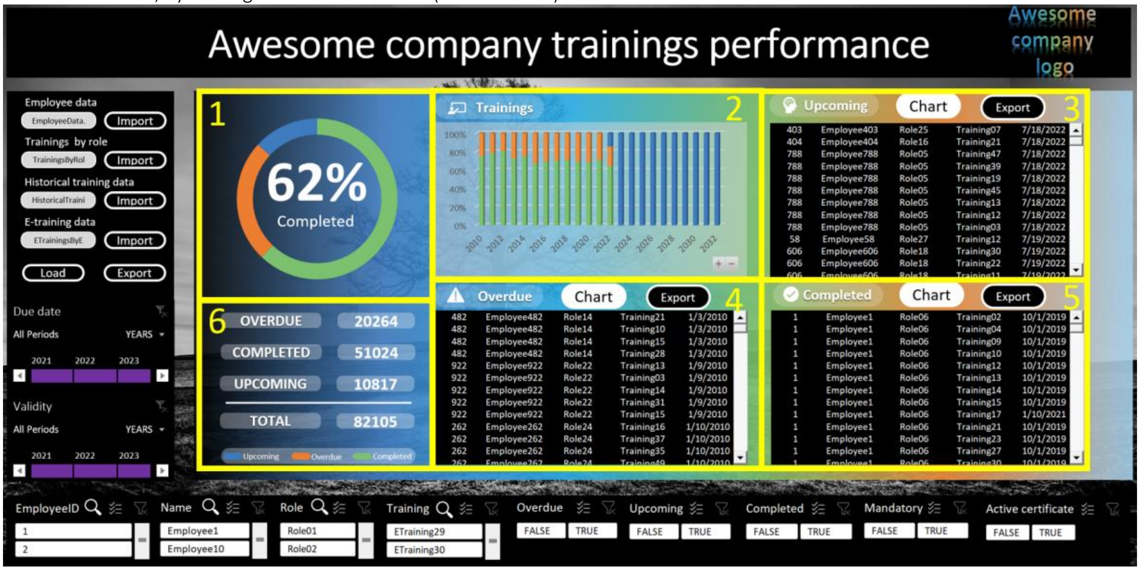


CHART OPTIONS

The charts can be zoom-in and out to display different levels (years/quarters/months/days) using the +/- signs found on the bottom right.

We do recommend filtering the charts before zooming in for a clearer interpretation of the charts

STEP 3: FILTER

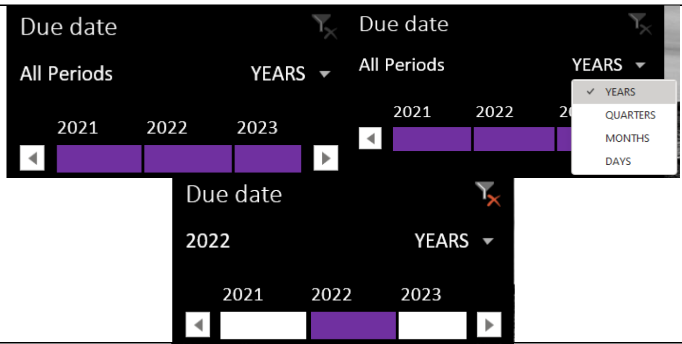
The dashboard allows to filter the trainings by:

1. Date
    a. Due date
    b. Validity date
2. Employee
    a. Identification Number
    b. Name
3. Role
4. Training
    a. Name
    b. Overdue
    c. Upcoming
    d. Completed
    e. Mandatory
    f. Active certificate

These filters are located in the left panel and footer.

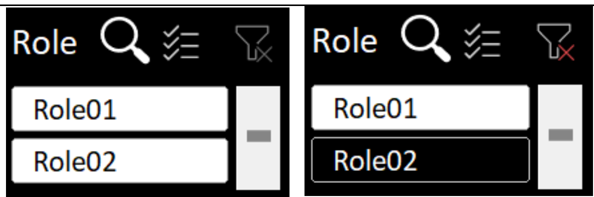
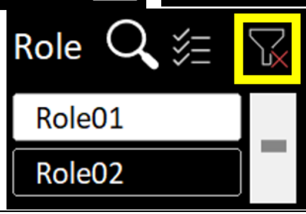
HOW TO FILTER

Example 1: filtering by due date

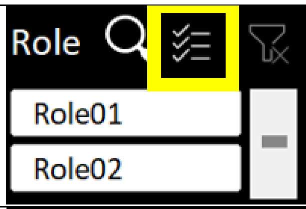
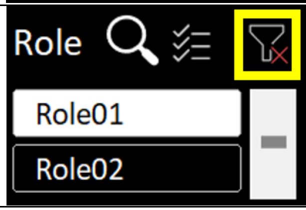
Select certain year/quarter/month/day by directly clicking	
Select certain year/quarter/month/day by using the slicer	
Clear the filter	

Example 2: filtering by role

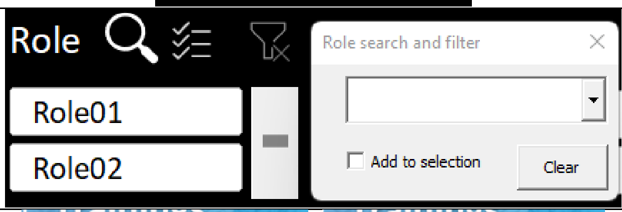
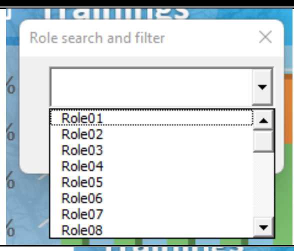
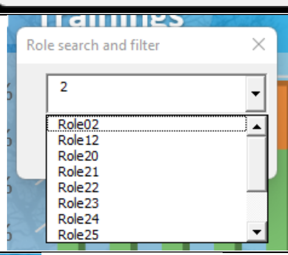
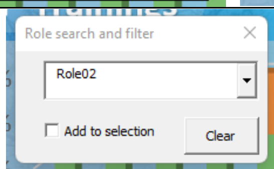
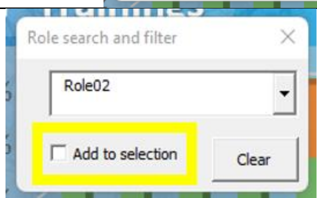
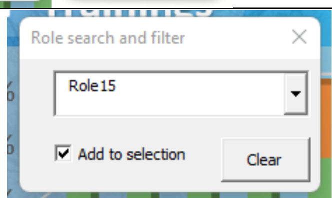
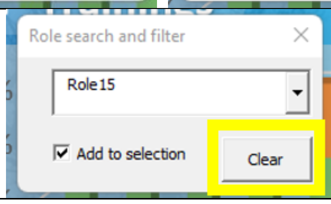
Option A

Filter certain role by directly clicking on the role	
Clear the filter	

Option B

Filter multiple roles using the multi-select feature	
Clear the filter	

Option C

Search for a certain role(s) using the search option	
Click on the magnifying glass	
Click on the drop-down menu	
Search for the role or type search text	 
Click the **Enter** key and the filter will be applied	 
To add additional roles, click on **Add to selection**, type/search for the new role, and click enter	 
Clear the filter	

Once the filter is applied, the dashboard is automatically updated. Multiple filters can be used simultaneously. E.g., Due date: May 2022, Roles: Role02 and Role15, Names: Employee1, Emplyee22, Employee46. Once you have filtered your data, you can visualize the results as described in Step 2.

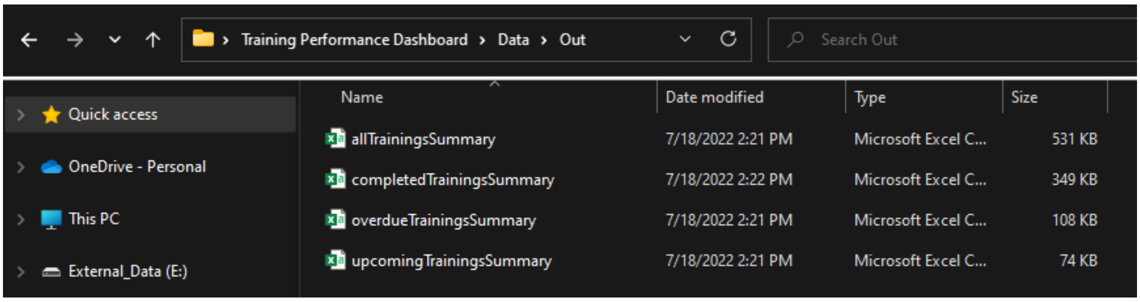
Step 4: Export data

If you would like to export the data, you have two options:

1. Export individual tables with the individual **Export** buttons located in the central panel.
   a. Overdue trainings
   b. Completed trainings
   c. Upcoming trainings

2. Export summary table with the **Export** button located in the left panel.

All these tables will be saved in the Out folder as .csv files.



STEP 5: CHANGE YOUR FILTERS

Step 2, 3 and 4 can be repeated by clearing the filters and/or adding new ones.

Important: If you export the updated data, you will lose the previous exported version. Make sure to change the location/names of the previous excels or rename them.

ADDITIONAL USEFUL INFORMATION

If you would like to better understand how the dashboard works, please check the **Developer's Manual** (only available under demand). Please reach me at oyaga.sergio@gmail.com .