**File Explanation**

* **Doc 1: Excel Signout Sheet Example**

This document is a standard XLSX file, so no macro enabled abilities. It is designed to be used by individuals on a project that requires signing out Excel workbooks that are also in the XLSX format. This could also be used for other projects that just require taking specific material and completing an action. It is a clone of the system I designed for the Virginia Project with Robert Half International. It is 2 separate sheets within the workbook, one visible and one hidden. Both are protected with the same password of 1. One sheet is called Signout and the other is titled Review. Review is hidden and attached to a query to the second workbook also called Review. For the query to work, the pathway for the query needs to be adjusted to where the Review workbook is located. Currently I have the Review workbook located within my Documents folder. To adjust this location, go to Data > Click Queries and Connections > Select Review Query when it appears > Right Click and Select Edit > Power Query Editor will load and Select Source, then edit the toolbar to change file location. This will also have to be performed for the Review workbook to be connected to the Signout Sheet for the secondary query. The query is currently set to be refreshed manually which is done by clicking the Refresh button on the Data tab. Normally, I’d set the query to refresh automatically when the file is opened but since the query will fail when you open the file, I have disabled that feature. To enable it, follow the steps to edit the Review query but instead of choosing to edit, select properties and mark the feature to refresh when file is opened then save and close the workbook. When this feature is enabled, it will force the user to either save or discard any changes made to the document which there will be alterations because the query was refreshed. Both sheets will have to be unprotected to achieve this. The main table is Signout which involves a nested IF statement that is referencing both the Signout and Review tables along with a VLOOK function that references a Roster table which is hidden off to the side on the Signout sheet just out of view. There are several cells that are locked except for the cells which I’ve deemed need to be edited. This is to preserve the formulas added and to protect the query table too if it is discovered. Hiding the query table and the sheet it belongs to is to prevent unnecessary alterations. There is a drop-down menu in the Fact Finder column which references the Roster table to get pod number. The Signout and Roster tables can be edited to add additional rows without harming the query to the Review table as it is set up to add any additional rows. However, I don’t believe adding columns will have the same result as the query within the Review workbook will need updating to include those new columns. Everything listed within the Roster and all items left of the Status column within the Signout table is transferred to the Review workbook through 2 separate queries. In conclusion, the primarily purpose of this workbook is to keep track of items, who is working on them, when they obtained them, the status of them, when they were returned, the duration of the work, the number of items, which pod checked them out, who supervised the work, and to exist as a standing record.

* **Doc 2: Excel Review Example**

This document is a standard XLSX file, so no macro enabled abilities. It is designed to be used by individuals on a project that requires signing out Excel workbooks that are also in the XLSX format. This could also be used for other projects that just require taking specific material and completing an action. It is a clone of the system I designed for the Virginia Project with Robert Half International. It is 2 separate sheets within the workbook, one sheet is called Review and the other is titled Stats. Review is pulling the information from the Signout table within the Signout workbook while Stats is pulling the Roster table from the same area. Review is where a ruling can be determined and the material within Signout can be examined from afar without interfering in the signout process. Such as missing material, examining or creating new statistics, forecasting how long it would take to complete the project, making rulings on complete work, etc. Neither sheet is protected as it is supposed to only be accessed by a select few individuals, specifically myself. Stats provides a cursory overview of the project with the ability to be easily expanded. In its current state it is set up to just provide a snapshot of its function, not a comprehensive example. As statistics were added over months of analysis and to recreate them all is beyond my current time constraint. There are 2 queries inside this workbook and just like before the pathway for these queries will need to be updated depending on where the Signout Sheet Example is located. The instructions are the same as before, to adjust this location, go to Data > Click Queries and Connections > Select Signout Query when it appears > Right Click and Select Edit > Power Query Editor will load and Select Source, then edit the toolbar to change file location. This will also have to be performed for the Roster query that also connects to the Signout workbook, so the same location needs to be applied. The queries are currently set to be refreshed manually which is done by clicking the Refresh button on the Data tab. Normally, I’d set the query to refresh automatically when the file is opened but since the query will fail when you open the file, I have disabled that feature. To enable it, follow the steps to edit the Review query but instead of choosing to edit, select properties and mark the feature to refresh when file is opened then save and close the workbook. When this feature is enabled, it will force the user to either save or discard any changes made to the document which there will be alterations because the query was refreshed. In conclusion, the primarily purpose of this workbook is to keep track of items, who is working on them, when they obtained them, the current status of them, when they were returned, the duration of the work, the number of items, which pod checked them out, who supervised the work, to provide a forecast of the project, to analysis the performance of the individuals within the project and the project as a whole depending on the workflow the workbook is attached, and to exist as a standing record. There is a more expanded version of this workbook possible, which would be a centralized tool for all workflows instead of needing separate workbooks for each workflow or for each additional set of data published as was done on the project as a partition. That is a much more complex endeavor to undertake that would require far more functioning queries and a far deeper analysis. This workbook serves as an interesting snapshot of the concept.