

## SAMaRT User Guide – Microsoft Excel (Advanced version)

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## Before you start

Sickness absence data is sensitive information. To prevent any unauthorised access to the tool, you should:

- a) Protect the tool with a password. On the top menu go to Tools>>Options, then the Security tab, and enter in a password in the 'password to open' field and press OK. It will prompt you to re-enter your password. Then save to ensure the security changes are kept. The tool will now require a password to be entered any time it is opened.
- b) Store the files in a secure folder on your computer or network.

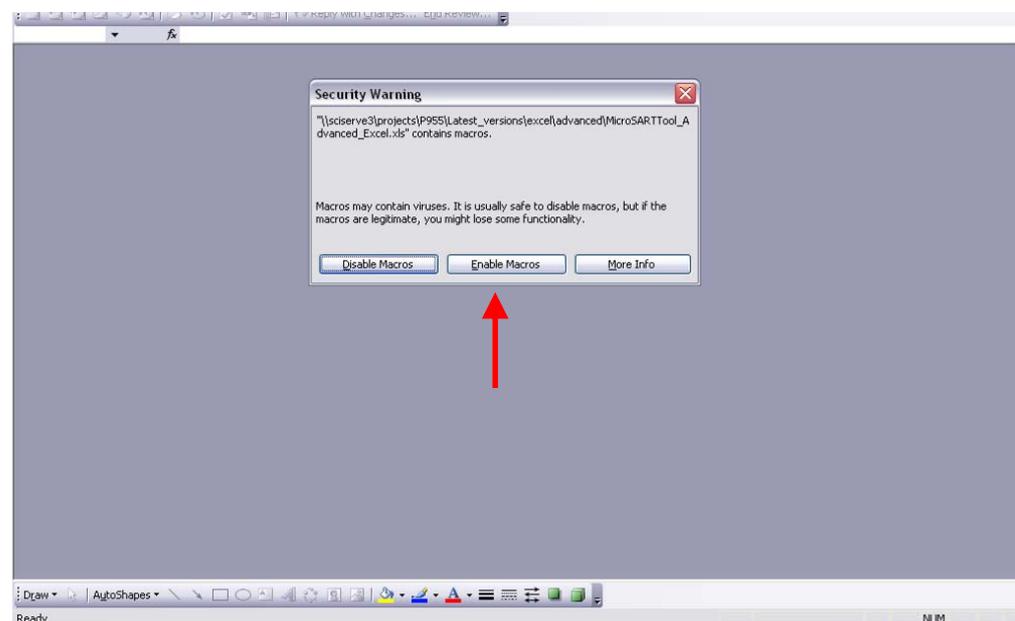
Remember to back up your files on a regular basis, maintaining all necessary security.

### Macros

Depending on your computer's security settings, you may need to change the security settings of Excel in order to be able to accept the macros that the tool uses.

Go to Tools>>Options, then click on the 'security' tab. Then click on the 'Macro Security' button at the bottom of the box. You will be taken to a security box which sets out the security levels of running macros. Set this to 'Medium' which allows you to choose whether or not to run macros.

Close Excel, and open the tool again. You should be greeted with this box if your security settings are set at 'medium'. Press 'Enable Macros' as indicated by the red arrow.



## Exploring the tool

The tool is made up of six different worksheets.

1. Instructions – this is the page that will appear each time you open the tool. It contains brief instructions on how to use the tool.
2. Entry Form – this is the form you should use to enter information on episodes of absence in your organisation.

3. Absence Record – this worksheet is where your data entered through the Entry Form is stored. Here you can amend/delete any records you have entered. You can also enter records directly into this worksheet without using the Entry Form.
4. Total Days Absence – this worksheet contains a pivot table to enable you to analyse your sickness absence data. This pivot table shows you the total number of working days absence for each employee.
5. Total Absence Type – this worksheet contains another pivot table to help you to analyse your data. It shows the total number of working days absent for each employee, organised by type of absence.
6. Code Lists – this worksheet lists the codes used in the drop down lists contained in the Entry Form and Absence Records. It is possible to change these codes to better suit your business. For more instructions on how to do this, please see the next section.
7. Troubleshooting/FAQs page – this worksheet contains condensed information from this user guide

## Using the tool for the first time

### *Introduction page*

When you open the Excel file, you will be greeted with the introduction page containing instructions on what to do before you start using the tool and brief user instructions on how to use the tool. We recommend you read these through carefully before you begin.

### *Changing the drop down list options*

The Entry Form and Absence Record worksheets use 'drop down lists' for some of the fields. Drop down lists contain a finite number of options to choose from, in order to make data entry easier. If you try to enter an option that is not in the drop down list, you will be greeted with an error message saying 'the value you have entered is not valid'. The lists have already been populated and can be found under the Code Lists tab.

You may wish to change the options available to you in the dropdown lists, e.g. if the job pattern options are not applicable to your business.

*Please note:* You can only change these codes before you start entering data. Once data is entered you cannot change the codes. We recommend that before you start to enter data, you have a look at the codes to determine whether you need to make any changes. We strongly recommend that you do not change the Absence Type and Illness Categories as these are standardised fields.

When you click on the Code Lists tab you will be greeted with a text box saying "Please don't change or remove current existing categories". This is referring to the absence type and illness categories. If you feel it would make the tool easier for you then follow these instructions:

1. Find the column of categories you wish to change, and delete the options that aren't relevant to you and add your new options
2. These changes will automatically be included in the 'EntryForm' and the 'AbsenceRecord' drop down lists.

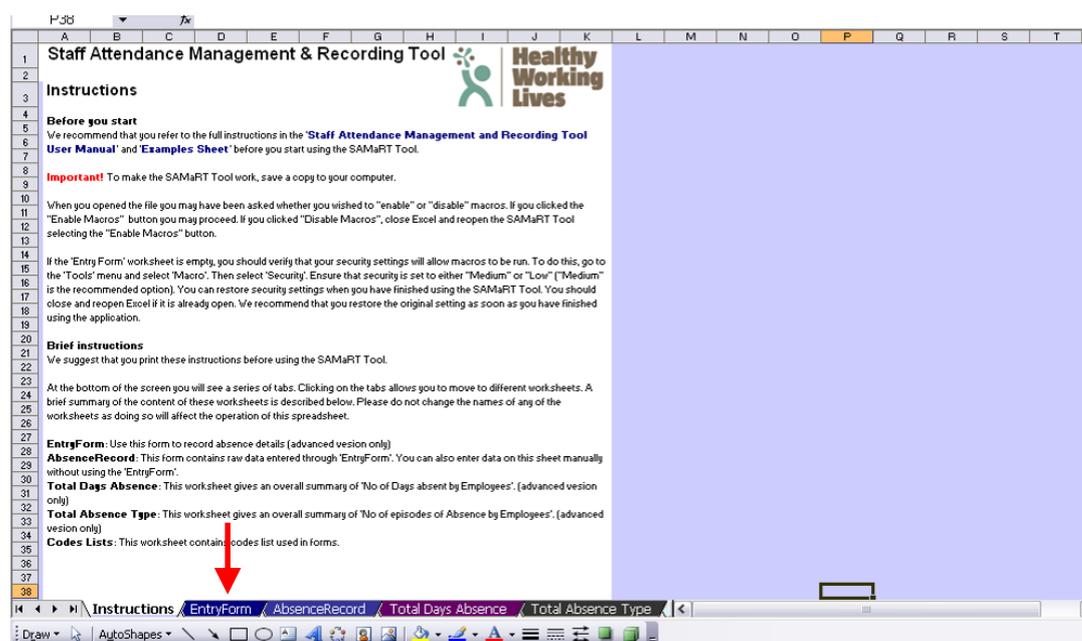
The maximum number of options is set at what is already listed e.g. there are currently 6 options under job pattern; therefore you can only have up to 6 options of your own choosing. If you add more than 6, the extra options will not appear in the 'AbsenceRecord' drop down lists; however they will appear in the 'EntryForm'.

You can add additional columns to the Absence Record (e.g. department); however these will not appear in the EntryForm, and so data entry will have to be done directly into the AbsenceRecord sheet. The tool has a comments field that you can use for any extra information.

## Entering data into the tool

### *The Entry Form*

Once you are ready to use the tool, press the 'EntryForm' tab as indicated by the red arrow.



The entry form contains the fields that you should fill in for each separate episode of absence. You do not have to fill out every field, but in order to gain the most complete records; we recommend that you fill out as much as possible.

### *Entering your data*

Use the 'EntryForm' to enter in your absence records. It is also possible to bypass the entry form and enter your data straight into the 'AbsenceRecord' sheet.

You should ensure that the start date of absence column is always filled out correctly.

Enter your employees' names in the way you want the records to appear i.e. surname then first name, or first name then surname. The way you choose will affect the way you can sort your names.

### *Amending and deleting existing data*

If you need to amend a record already entered, you can do this in the 'AbsenceRecord' tab. Identify the record you wish to change and amend the required information directly in the cell.

You can also delete entire records from this tab. As shown below, simply select the row you wish to delete by clicking on the row number at the very left of the screen (in the example, this is row 3). Then right click and select 'delete' from the options that

appear, as indicated by the red arrow below. Do not simply clear the information from the row by pressing delete on your keyboard, you need to delete the row in its entirety.

	A	B	C	D	E	F	G	H	I	J	
1	EmployeeName	Emp ID	D.O.B	MF	Job Title	Job Pattern	Manager	Absence Type	Start Date of Absence	No of Working Days Absent	Illness Category
2	Alan	111	01/03/1970	M	Sales manager	FT - days	Peter	05 Compassionate leave	01/01/2010	2	0 Not applic
3	Chris	112	01/05/2010	M	Technician	FT - nights	Peter	06 Time off in lieu	17/03/2010	1	0 Not applic
4	James	113	05/03/1980	M	Cleaner	PT - nights	Chris	07 Sickness	14/03/2010	2	13 Cold, C
5	Mark	114	14/08/1984	M	Operations	FT - days	Fred	06 Time off in lieu	17/03/2010	1	0 Not applic
6	Tom	115	13/12/1986	M	Accounts Clerk	FT - days	John Redmond	06 Time off in lieu	22/03/2010	1	0 Not applic
7	Jane	116	18/07/1982	F	Marketing Manager	FT - days	Irene Lean	07 Sickness	04/04/2010	2	11 Back Ph
8	Susan	117	13/04/1985	F	Operations	FT - days	Adam	07 Sickness	04/04/2010	3	13 Cold, C
9	Siobhan	118	16/10/1987	F	Secretary	FT - days	Chris	07 Sickness	22/03/2010	2	16 Headac
10	Andy	119	12/09/1983	M	Technician	FT - nights	Andy	07 Sickness	22/03/2010	3	16 Headac
11	Ian	120	11/02/1981	M	Finance	FT - days	Chris	02 Parental leave	04/04/2010	5	0 Not applic
12	Tom	115	13/12/1986	M	Accounts Clerk	PT - days	John Redmond	01 Annual leave	04/04/2010	7	13 Cold, C
13	Heather	116	19/12/1989	M	IT Helpdesk	FT - days	Andy	07 Sickness	22/03/2010	2	0 Not applic
14	David	117	30/01/1979	M	IT Manager	FT - days	Andy	06 Time off in lieu	04/04/2010	1	0 Not applic
15	Chris	112	01/05/1976	M	Technician	FT - nights	Peter	07 Sickness	14/03/2010	2	16 Headac
16	Ian	120	11/02/1981	M	Finance	PT - nights	Chris	06 Time off in lieu	14/03/2010	1	0 Not applic

## Analysing your data

### Filtering your data

You can filter your data in order to see only certain information, such as an individual employee.

To set up auto-filter, select all of the headings in row 1 (e.g. employee name, emp id D.O.B and so on), then go to the data menu found at the top of excel, select 'filter' and then 'autofilter' as shown below by the red arrow in the screen shot below.

1	EmployeeName	Emp ID	D.O.B	MF						
2	Absence Type	Start Date of Absence	No of Working Days Absent	Illness Category						
2	05 Compassionate leave	01/01/2010	2	0 Not applic						
3	06 Time off in lieu	17/03/2010	1	0 Not applic						
4	07 Sickness	14/03/2010	2	13 Cold, C						
5	06 Time off in lieu	17/03/2010	1	0 Not applic						
6	06 Time off in lieu	22/03/2010	1	0 Not applic						
7	07 Sickness	04/04/2010	2	11 Back Ph						
8	07 Sickness	04/04/2010	3	13 Cold, C						

You should now see drop down arrows to the right of every heading as shown below. You can use these filters to show you different things.

For example, you can see how many episodes of absence each employee has by pressing the filter for employee name (as shown by the red arrow) and selecting the desired name from the list, or the top 10 names that appear most often.

Another example would be to select a specific illness category (column K) e.g. back problems, to see how many employees have had time off for this category.

EmployeeName	Emp ID	D.O.B	M/F	Job Title	Job Pattern	Manager	Absence Type	Start Date of Absence	No of Working Days Absent	Illness Category
Chris	111	01/03/1970	M	Sales manager	FT - days	Peter	05 Compassionate leave	01/01/2010	2	0 Not applicable
Chris	112	01/05/2010	M	Technician	FT - nights	Peter	06 Time off in lieu	17/03/2010	1	0 Not applicable
Chris	113	05/03/1980	M	Cleaner	PT - nights	Chris	07 Sickness	14/03/2010	2	13 Cold, Cough
Chris	114	14/08/1984	M	Operations	FT - days	Fred	06 Time off in lieu	17/03/2010	1	0 Not applicable
Chris	115	13/12/1986	M	Accounts Clerk	FT - days	John Redmond	06 Time off in lieu	22/03/2010	1	0 Not applicable
Chris	116	18/07/1982	F	Marketing Manager	FT - days	Irene Lean	07 Sickness	04/04/2010	2	11 Back Pain
Chris	117	13/04/1985	F	Operations	FT - days	Adam	07 Sickness	04/04/2010	3	13 Cold, Cough

You can also use the auto-filter to sort your data (in either ascending or descending order of the column selected).

This will also work if you want to sort your data while it is filtered. For example, your data is currently filtered to show only Chris's absences, and you want to sort his absences by start date of absence. Just press the arrow next to 'start date of absence' and then press 'sort ascending'.

### Pivot Tables

This tool uses pivot tables as a way to analyse your data. There are two pivot tables set up for you in this tool:

1. Total days absence
2. Total days by absence type

The data you enter in the entry form/absence recording sheet will automatically appear in the pivot tables.

Note: You need to have at least 5 episodes of absence entered before you begin to analyse your data to ensure the pivot table works correctly.

### How pivot tables are set out

Pivot tables are set out in 'row', 'column' and 'data' areas.

1. The row areas control the data to be displayed and are the fields on the left of the table. They are in the red box on the screen shot below.
2. The column areas also control the data to be displayed and are the fields running along the top of the table. They are in the green box on the screen shot below.
3. The 'data' area identifies the data to be summarised and is where all the numbers are. The area is in the yellow box on the screen shot below.

Count of No of episodes of absence	Start Date of Abs	EmployeeName	Emp ID	01 Annual leave	02 Parental leave	04 Maternity/paternity leave	05 Compassionate leave	06 Time off in lieu	07 Sick leave	Grand Total
Jan	Alan	111								
Mar	Alan	111		1	0	0	0	0	0	1
	Chris	112		0	0	0	0	1	0	1
	Chris	112		0	0	0	0	0	1	1
	David	123		1	0	0	0	0	0	1
	Harry	122		0	0	0	0	0	1	1
	Ian	120		0	0	0	0	1	0	1
	James	113		0	0	0	0	0	1	1
	Mark	114		0	0	0	0	1	0	1
	Shoena	118		0	0	1	0	0	1	2
	Tom	115		0	0	0	0	1	0	1
Apr	David	123		0	0	0	0	1	0	1
	Ian	120		0	1	0	0	0	0	1
	Jane	116		0	0	0	0	0	1	1
	Susan	117		0	0	0	0	0	1	1
	Tom	115		1	0	0	0	0	0	1
Grand Total				3	1	1	1	5	7	18

It is possible to amend the pivot tables to show you something new e.g. number of days absent by job title.

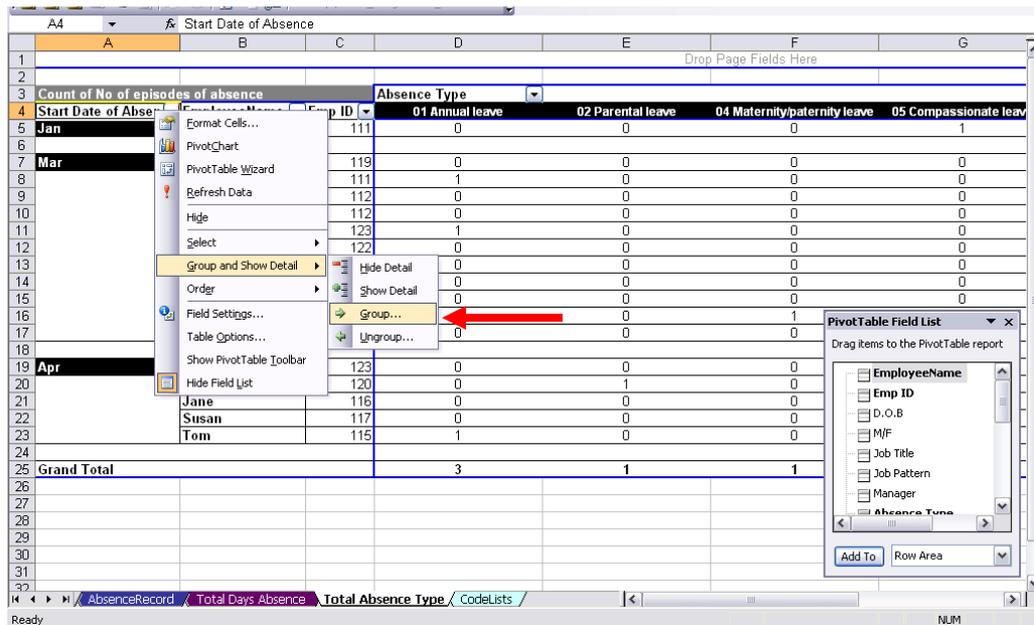
**Hint:** Save an existing pivot table in a new worksheet before amending it. This way, you will retain the original table, and have a new one already linked to the raw data that you can amend until you are happy with what it is showing you. You can create as many new worksheets as you want, so you end up with a number of different results tables showing you different things. To save in a new worksheet:

1. Right click on the tab (found at the bottom of the screen) of the table you wish to copy e.g. 'Total absence type'
2. Select 'Move or Copy' in the options that appear
3. Select where you want the sheet to appear e.g. 'move to end' will place the sheet last after all existing sheets
4. Select 'Create a copy'
5. Rename your new sheet by right-clicking on the tab and selecting the 'rename' option.

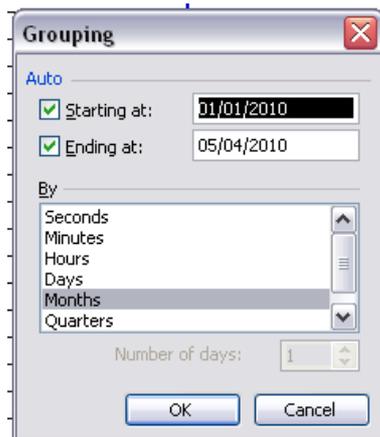
### Grouping your data

There are various ways to group your data e.g. by month, quarter, year. The pivot tables are, as a default, grouped by month.

To organise your data by another time period, right click on the 'Start date of Absence' field, then go to 'Group and Show Detail' then 'Group' as indicated by the screen shot below.



You will have a number of options to choose from as indicated by the grouping box that will appear.



You can also ungroup your data by following the above procedure, but instead of clicking on 'group', click 'ungroup'. This will cause your data to be organised by individual start dates of absence.

### *Amending the pivot tables*

#### Using the pivot table drop down lists

It is possible to amend the pivot table to show only certain types of absence. To do this, you need to click on 'absence type' as indicated by the red arrow. This will provide you with the option of choosing what absence types show up on the table. You can change this as often as you wish. The same thing can also be done for the employees or start date of absence. Simply click 'EmployeeName' or 'Start Date of absence' and follow the same procedure. This will allow you to analyse the data by absence type, or by specific employees or dates.

Count of No of episodes of absence	Absence Type	02 Parental leave	04 Maternity/paternity leave	05 Compassionate leave
Jan	Alan	111		
Mar	Adam	119		
	Alan	111		
	Chris	112		
	Chris	112		
	David	123		
	Harry	122		
	Ian	120		
	James	113		
	Mark	114		
	Shoena	118		
	Tom	115		
Apr	David	123		
	Ian	120		
	Jane	116		
	Susan	117		
	Tom	115		
Grand Total		3	1	1

### Adding a pivot table field

You can change the fields of the pivot tables. To do so, first make sure the PivotTable Field List is visible. If it isn't, simply right-click anywhere on the pivot table and select the option 'Show Field List', located at the bottom of the options.

To add a field, e.g. Job pattern, to the row pivot table area (e.g. where the start date of absence is set out):

1. select it on the PivotTable Field List; then
2. select 'Row Area' in the drop down list at the bottom of the Field List; then
3. click 'Add to' as indicated by the red arrow

If you want to add a field to the columns e.g. where the absence type is set out, follow the same steps but select 'Column Area' in the drop down list at the bottom of the Field List.

The data area is different to the row and column areas and we recommend you do not add anything to this area as it may produce confusing results depending on whether the field added contains text, numbers or blank spaces.

### Removing a pivot table field

If you want to remove a field, click on the field heading (not the drop-down arrow) – in this example the absence type as indicated by the red arrow – drag back to the PivotTable Field List, as indicated by the black arrow, until a *red cross* appears next to the mouse pointer, and release.

Count of No of episodes of absence	Absence Type						
Start Date of Absen	EmployeeName	01 Annual leave	02 Parental leave	05 Compassionate leave	06 Time off in lieu	07 Sickness	Grand Total
Jan	Alan	0	0	1	0	0	1
Mar	Alan	1	0	0	0	0	1
	Chris	0	0	0	0	0	0
	Chris	0	0	0	0	0	0
	David	1	0	0	0	0	1
	Harry	0	0	0	0	0	0
	Ian	0	0	0	0	0	0
	James	0	0	0	0	0	0
	Mark	0	0	0	0	0	0
	Shoena	0	0	0	0	0	0
	Tom	0	0	0	0	0	0
Apr	David	0	0	0	0	0	0
	Ian	0	1	0	0	0	1
	Jane	0	0	0	0	0	0
	Susan	0	0	0	0	0	0
	Tom	1	0	0	0	0	1
Grand Total		3	1	1			17

### Rearranging the pivot table fields

It is also possible to rearrange the fields. To do this, just click on the Field heading (not the drop down arrow) and drag to the desired position. A grey shaded line will appear as you drag the fields, wait until this shaded line is at the desired place and then release. For example:

- You can drag the 'EmployeeName' field to the beginning of the pivot chart i.e. the 'row' area simply by dragging it onto the 'start date of absence' field i.e. the field currently at the beginning of the chart. The chart will now be organised firstly by employee name, and then start date of absence.
- You can also drag the fields from the row position to the column position and vice versa. From there you can rearrange them in the desired order following the above step.

### Creating a new pivot table

If you want to leave the provided Pivot Tables as they are, you can create additional ones that show different trends. To create a new Pivot Table, follow the instructions below.

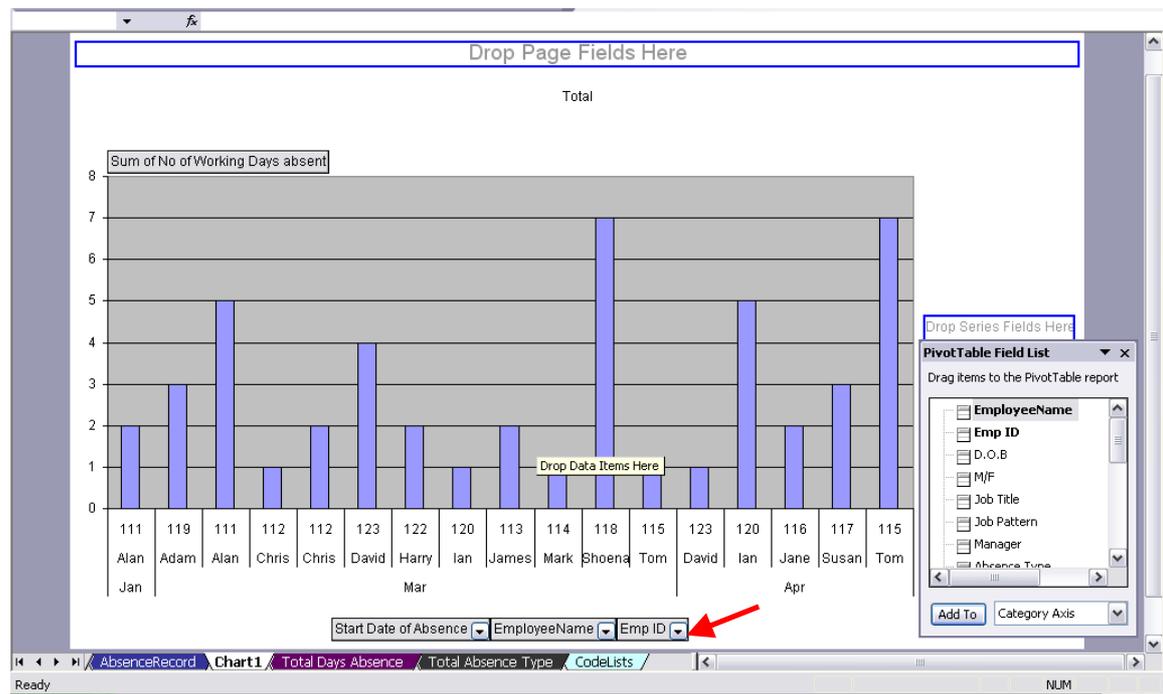
- Go to the 'AbsenceRecord' sheet
- On the Data menu, click 'PivotTable and PivotChart Report'.
- In step 1 of the PivotTable and PivotChart Wizard, click 'Microsoft office Excel List or Database', and then under 'What kind of report do you want to create?', click 'PivotTable'.
- In step 2 of the wizard, select the 'AbsenceRecord' sheet and drag/highlight columns headings from A to S (or alternatively, you can choose to only include a certain range of columns to include in data analysis).
- In step 3 of the wizard, click 'New Sheet' and click Finish. This will create a new sheet with Pivot Table. Rename the new sheet.
- From here, you can drag and drop the required fields onto the pivot table.

For more detailed instructions on pivot tables and how to create one please go here:

<http://office.microsoft.com/en-us/excel-help/pivottable-reports-101-HA001034632.aspx> or here: <http://office.microsoft.com/en-gb/excel-help/analyze-data-with-pivottable-reports-HA001207164.aspx?CTT=1&origin=EC001022983>

### Charts

It is also possible to create a graphical representation of the data. Right-click anywhere on the Pivot Table and select the 'PivotChart' option. This will create a chart in a new worksheet with all the data currently shown on the Pivot Table. For example, if you were currently only looking at a specific employee's data on the table, selecting the PivotChart option will initially create a chart showing that employee's data. Once the chart has been created, however, you can alter the employees or dates that the chart shows as shown by the red arrow. You can also add or remove fields in the same way as described in the pivot table instructions above.

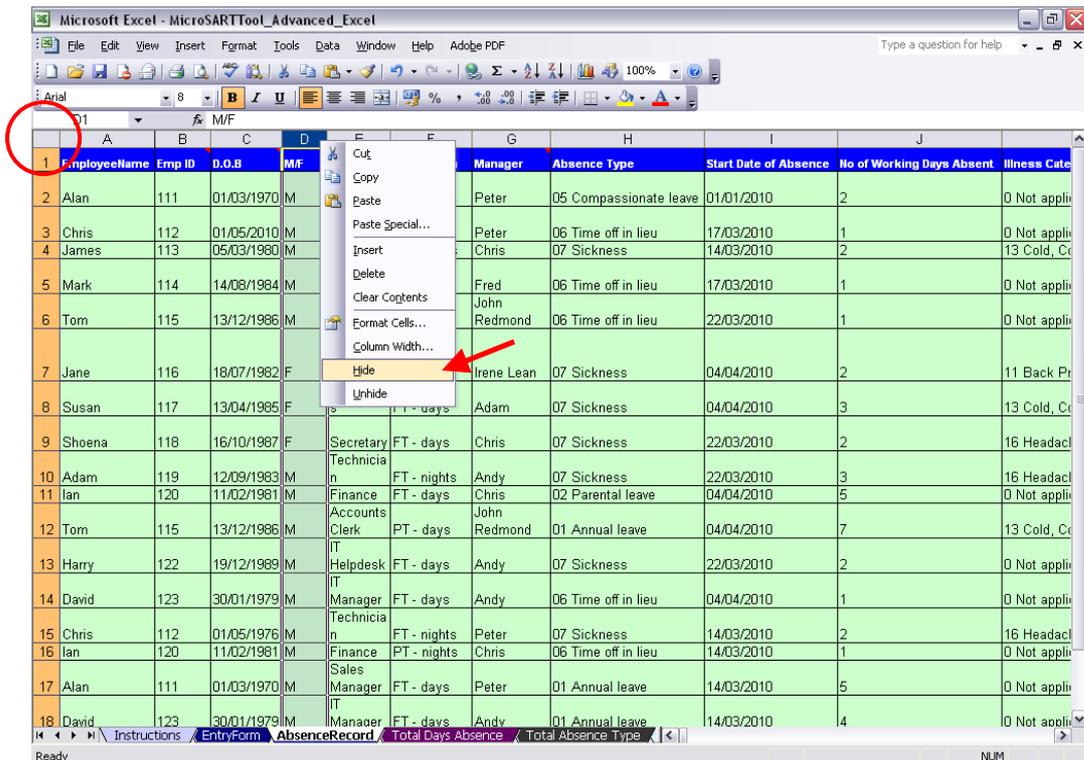


We suggest that you print out a copy of the chart, make a note of the date on it, and then delete it within the tool. This is because it may get too unmanageable to have all the charts you have created sitting within the tool.

After you have printed out the chart, dated it, and placed in a secure location, simply right click on the tab of the chart and select 'delete'. This will delete the chart from the tool.

### Printing

If you want to print out the absence records, you can hide some of the columns so that it fits more easily onto one sheet. Right click on the column headers of the columns you wish to hide, then select 'hide' as shown by the red arrow below. To unhide all the columns, select the whole sheet by pressing the 'ctrl' button and the letter 'A' at the same time, or by pressing the button in the top left corner of the worksheet (as shown by the red circle). Then right click anywhere on the column headers and select 'unhide'.



You can also adjust the printing margins by going to the 'view' menu at the top of the screen and selecting 'page break preview'. From there, you can adjust the margins as you see fit, as shown by the red arrow. You can then go to print preview (File menu>>print preview) to see how it will look when you print it out. To go back to a normal view, simply go back to the 'view' menu and select 'normal'.

