Basic Formulas and Pivot Tables

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| Question | Answer | Output(s) | Notes |
| **What** is the task that people need to perform? | Create basic formulas and pivot tables in Microsoft Excel using selected data sources. | Learning Objective:  User will obtain a basic working knowledge of how to create and use basic formulas and Pivot Tables in (MS) Excel for practical application with daily Workload Management and Performance Management needs. | All tasks are performed in Microsoft Excel using data downloaded from sources like VBMS, Tableau/EPR/WATRS, and QMS |
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| **Where** do they perform the task? | All tasks are performed using Microsoft Excel using data from selected data sources. | Task conditions, also media and method:  Course can be delivered via TMS, Adobe Captivate | This course can easily be self-directed through TMS or Adobe Captivate. |
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| **What** do they use to perform the task? | Access to a computer and Microsoft Excel and access to selected data sources. | Task conditions: Trainee will need hands on access to computer and have all permissions to access VBMS (coach functions) and/or Tableau | All tasks are performed using Microsoft Excel and a data source. |
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| **Who** are the people that perform the task and where are they? | Assistant Coaches and Coaches in the Regional Offices across the nation. | Target audience(s), media and methods: New Supervisors with permissions granted to data sources like VBMS, Tableau, EPR/WATRS | If the new supervisor does not yet have access granted to Tableau (to include EPR/WATRS) then supervisor access to VBMS will allow them to have a needed data source. The principals can applies regardless of where the data comes from. |
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| **What** do they already know how to do? | Fundamental use of Microsoft Excel and how to access the needed data. | Prerequisite knowledge: How to use a basic (MS) Excel spreadsheet. How to access basic data in programs like Tableau and VBMS. | Available training products?  Workload Management  EPR/ETR Intro  EPR/ETR Refresher |
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| **What** is the new knowledge required? | How to create basic formulas and Pivot Tables in (MS) Excel using selected data sources. |  | Know how to use (MS) Excel, know and understand station policy and workload management requirements and performance management and have access to data sources like Tableau and VBMS supervisor functions |
| Question | Answer | Output(s) | Notes |
| **How** will we assess student mastery of the learning objectives? | Using TMS or Adobe Captivate Prime, trainee will complete practical application exercises that enhance knowledge and understanding of (MS) Excel formulas and Pivot Tables. | Create a basic formulae and Pivot Table in (MS) Excel | Practical application exercises will provide a basic understanding of the learning objective so the trainee can better perform workload management and performance management functions as a coach. |
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| **When** do they need to be able to perform this task? | Course completion once the new coach has access to Tableau and/or VBMS. Course can be completed with only Supervisor access to VBMS but access to Tableau is preferred. | Generate development timeline. |  |
| **Timeline** | | | |
| **Date** | **Task** | **Status** | **Notes** |
| 11-15-2019 | Develop concept, learning objectives and assessment strategy. | Completed |  |
| 11-15-2019 | Approve concept, learning objectives and assessment strategy | Completed |  |
| 11-15-2019 | Research, acquire existing and related information (training, polices, etc.) | Completed |  |
| 11-15-2019 | TMS item shell created and TMS assignment strategy developed | Completed |  |
| 11-15-2019 | SMEs provide content input (situations, correct answers, distractors and feedback) | In Process |  |
| 11-25-2019 | Draft content and assessment instrument reviewed by SME | In Process |  |
|  | Corrections made, content and instrument approved |  |  |
|  | Links to instruments, content and survey added to TMS item and tested |  |  |
|  | Curriculum/Item ready |  |  |
|  | Training assigned |  |  |

Contact list

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