

EQM Ltd

the people involved

**Re-evaluation Log User
Manual**



External Quality
Management Ltd

Line Utilization Log User Manual

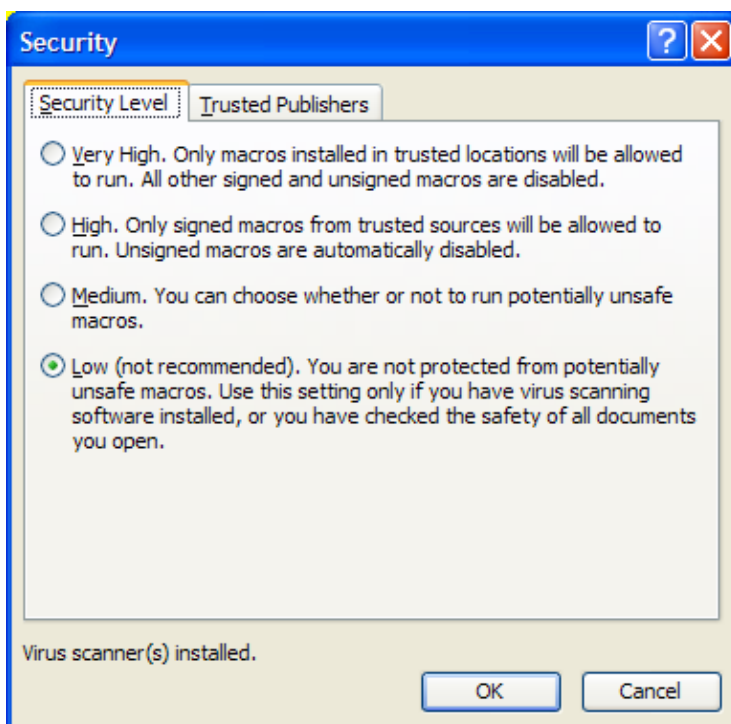
Introduction

The Re-evaluation Log.xls is a macro driven spreadsheet that will calculate the statistics of Re-evaluation in any given month. This User Manual gives instructions on how to use the spreadsheet to obtain the required reporting functionality.

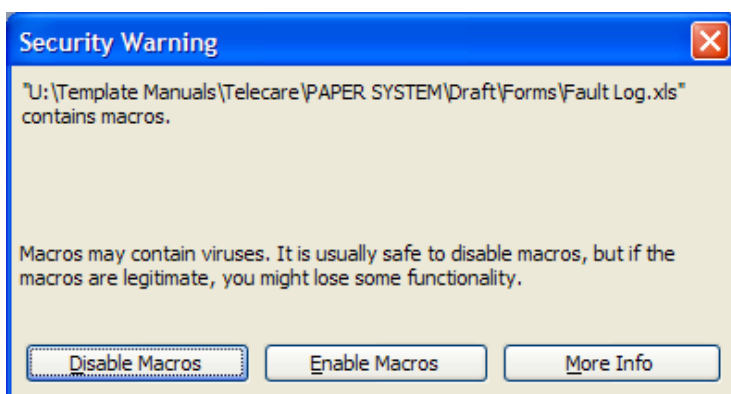
Getting Started

The spreadsheet is macro driven. However, Excel sees running macros as a potential threat to the integrity of the system and would rather macros were disabled i.e. not allowed to run. You have two choices:

1. Permanently enable macros. To do this, in Excel go to the "Tools" menu, select "Macros" and from the sub-menu select "Security". On the "Security Level" tab, select the "Low" option and press "OK".



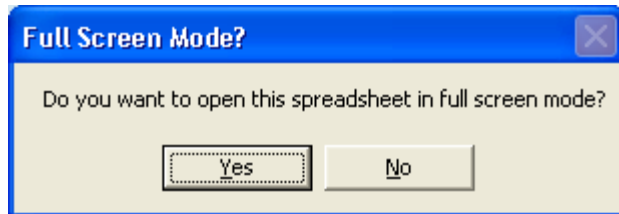
2. Enable macros on a session by session basis. To do this, leave the security setting at "Medium" and you will be presented with a warning screen when you open the Re-evaluation Log file. Then just select "Enable Macros" in the warning message.



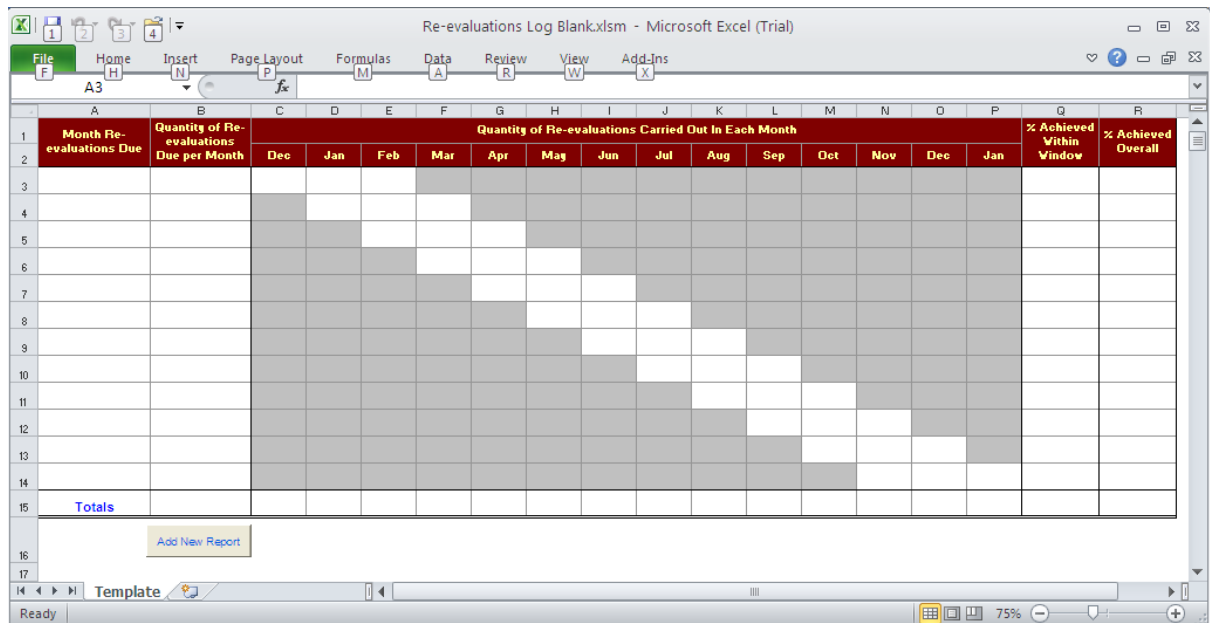
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Note - Do not select the "High" or "Very High" security settings for the macros in your version of Excel as that would disable the macros and the functionality that you require in the Re-evaluation Log would not be available.

When you first open the spreadsheet you will be asked if you want to show the spreadsheet in full-screen mode. If your screen resolution is reasonably high, it will look better in reduced screen mode so click "No". Otherwise click "Yes".



When the spreadsheet opens, it will look like this:



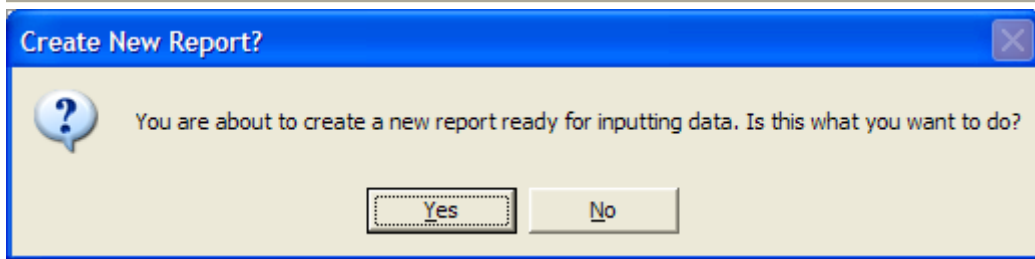
You cannot enter any information in the various cells as they are protected. All you can do is click on the button marked "Add New Report".

Creating a New Report

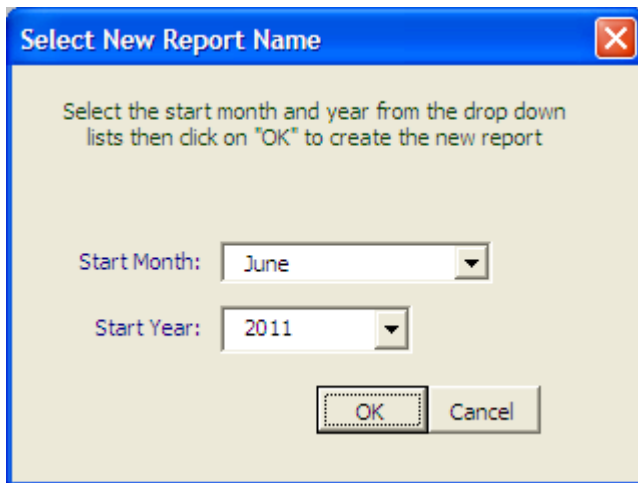
Clicking on the button "Add New Report" will allow you to create a similar sheet where you can enter all of the Re-evaluation Log information. Clicking this button also protects the worksheet and the workbook.

You will be asked whether you actually want to create a report:

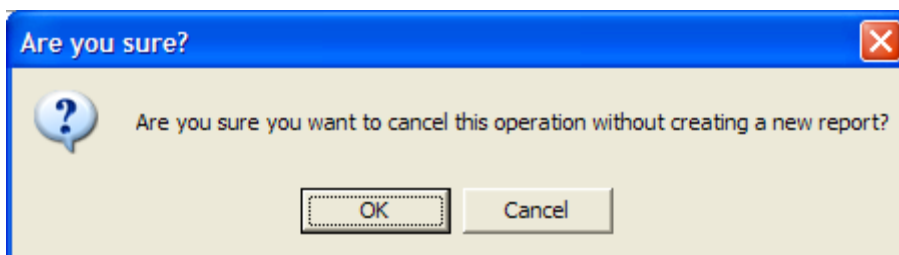
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Clicking "No" cancels the operation (in case the button was pressed in error). Clicking "Yes" takes you to a screen where you can denote the name of the "tab" for this report. It is envisaged that a new report will be started each year, so the tabs will be named by start year and finishing year. The system will always select the month and year of the month following the month in which you are carrying out this task but this can be changed from the drop down boxes. It is important to get this right for all the obvious reasons but also because the information input here will be used to create the new report.



Clicking on Cancel will cause a prompt to ask whether you really meant to cancel the operation.



Clicking on "OK" cancels the "Add New Report" operation and returns you to the "Template" tab. You will receive confirmation that the operation was cancelled. Clicking on the "Cancel" button cancels the cancelling operation and leaves you with the "Select New Report Name" box open.

With the "Select New Report Name" box open insert a Month and Year into the two boxes and click on "OK". This will create a new report and place it directly behind the "Template" sheet. Over time, this has the effect of pushing older reports further to the right. You have now created a new Re-evaluation Log Report to track all faults re-evaluations due and carried out in the specified month.

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The log may look like this when a few entries have been made. This particular log would occur after the actual visits achieved figures were input at the end of September 2011:

Month Re-evaluations Due	Quantity of Re-evaluations Due per Month	Quantity of Re-evaluations Carried Out In Each Month												% Achieved Within Window	% Achieved Overall			
		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr			May	Jun	
June 2011	27	2	17	8													100.00%	100.00%
July 2011	30		4	16	9	1											96.67%	100.00%
August 2011	32			3	17	12											100.00%	100.00%
September 2011	25				4	18											100.00%	100.00%
October 2011	31					3											9.68%	0.00%
November 2011	34																0.00%	0.00%
December 2011	29																0.00%	0.00%
January 2012	28																0.00%	0.00%
February 2012	30																0.00%	0.00%
March 2012	32																0.00%	0.00%
April 2012	29																0.00%	0.00%
May 2012	28																0.00%	0.00%
Totals	355	2	21	27	30	34											83.66%	100.00%

If “% Achieved Within Window” figures are less than 100%, it will show up as a white font on red background. This is noncompliant and it indicates a resourcing problem.

If “% Achieved Overall” figures are less than 100%, it will show up as a white font on red background. This is noncompliant and it indicates that a planned visit has not actually been carried out. a resourcing problem. Address the list of planned re-evaluations to find out which visit has been missed. Plan the missed visit and, once completed, enter the figures in the correct months. When all visits planned for that month are completed, the “% Achieved Overall” figure should reach 100% and revert to black text on a white background.

The report should be printed off, preferably in colour. Any items showing up in solid red are to be investigated and the reasons for the shortfall should be explained in writing to the satisfaction of the Control Room Manager. (You may have a separate form for this purpose called an “Exceptions Report”.) The explanation should also indicate the actions needed to prevent a recurrence of this shortfall in the future. These recommendations may be by action plan, corrective actions, list of things to do, written into the explanation document (exception report) or appended to the Re-evaluation Log by hand. The key thing is that correct control is exercised to ensure that the rectification actions are carried out and verified later as having been effective in closing down the original problem.

This explanation should be attached to the printed copy of the report and filed with it. The explanation should be signed and dated by the Control Room Manager to show that it has been reviewed satisfactorily. Then, it should be filed in a folder or drawer that is specifically for these reports. This makes the records easily retrievable for audit and review purposes.

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IMPORTANT NOTE

The formulae in this spreadsheet are dependent upon the Analysis Toolpaks being enabled in Microsoft Excel 2003. Go to the "Tools" menu, select "Add Ins" select the "Analysis Toolpak" and the Analysis Toolpak for VBA then press OK. Do not save the work sheet until after this has been done.

Other versions of Microsoft Excel may already have this feature enabled, but probably not.

OTHER NOTES

WHY THE NEED FOR THIS REPORT?

The original reports created from the calls handling software are either too complex, not clear enough or just plain wrong. There was a need to have this information presented clearly and simply and to tell the user whether the statistics are compliant or not. Hence this report was produced.

A GOOD ROUTINE

It is recommended that you create a copy of the "Re-evaluation Log Blank.xls" and rename it to "Re-evaluation Log Live.xls". Then follow the routines below on the live version of the spreadsheet.

After a period of time, when there are thousands of entries in it, the spreadsheet will take longer and longer to open. At that point, simply rename the existing live file to include "Archive 01" in the file name or dates such as "2010 to 2020". Then create another copy of the "Re-evaluation Log Blank.xls" and rename it to "Re-evaluation Log Live.xls". Then follow the routines above on the new live version of the spreadsheet.

PROTECT ME

This spreadsheet needs to be protected in order for the automated functionality to work correctly. However, as it is your spreadsheet, you may have a need to change the spreadsheet from time to time. To access this spreadsheet's protected areas, unprotect the worksheets using the password "12345qwertasdfgzxcvb". When finished with your changes go to the "Template" page and press the "Add New Report" button. This applies all of the protection to the worksheet and the workbook. When asked if you want to create a new report, click on the "No" button and then save the worksheet to save your changes.

HOW IT'S DONE

The formulae in the spreadsheet are all in the percentages columns and the totals row. These are locked to prevent them from being altered. The red colour in the percentages columns is created with conditional formatting.

The coding behind the spreadsheet is all about creating a new spreadsheet in the correct format.

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Copyright Notice

This User Manual and the spreadsheet to which it refers is the work of Andy Galloway of External Quality Management Ltd, Southampton SO19 4DJ, England. T: 023 8044 0866.

Please feel free to share this spreadsheet with friends and colleagues. However, please also ensure that a copy of this User Manual always accompanies the associated spreadsheet.

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