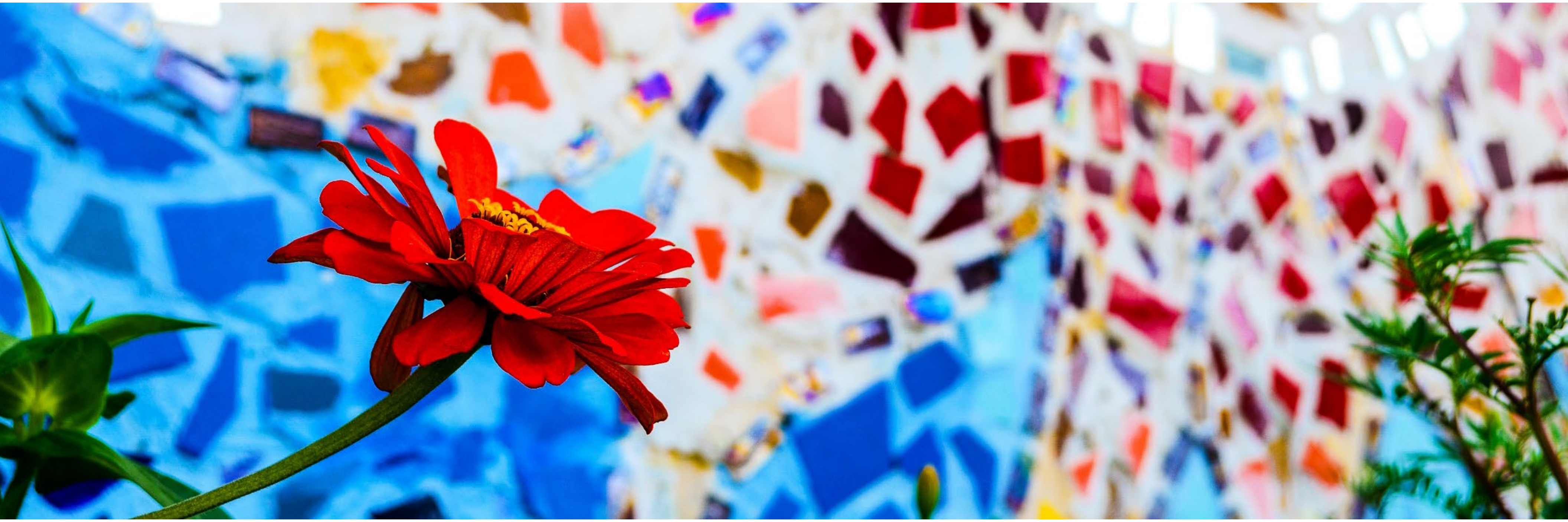
Team Work Plan Template – Frequently Asked Questions (FAQs)

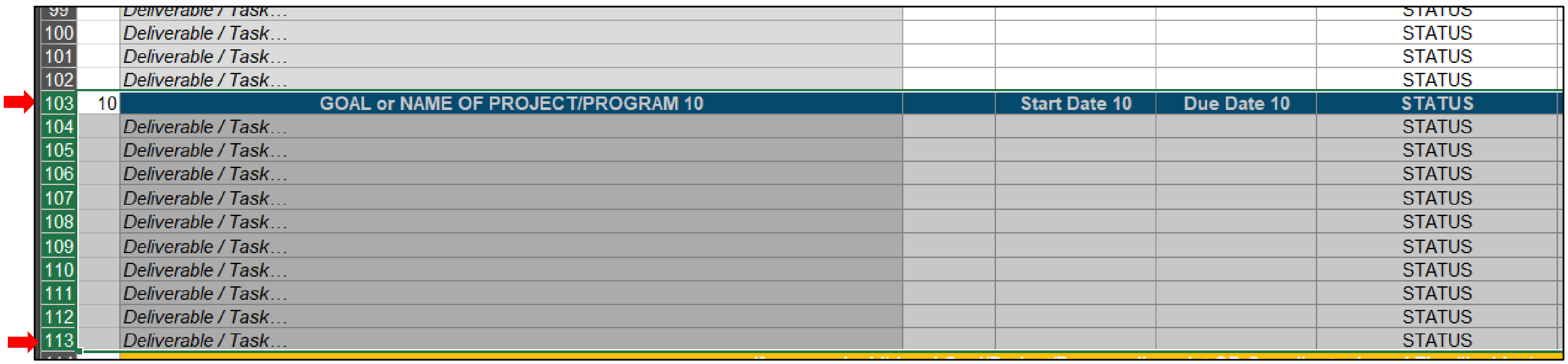


Contents

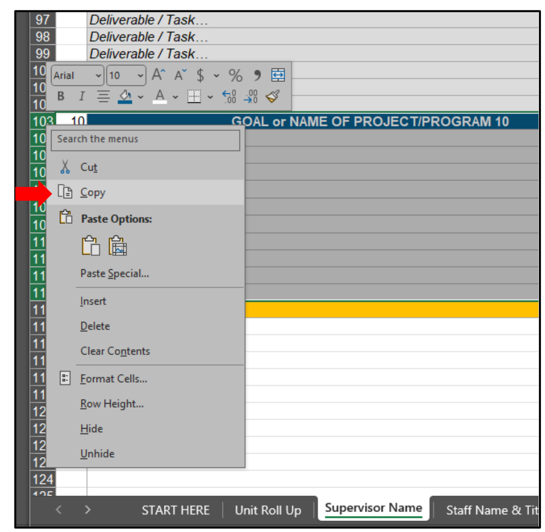
How do I add more **MAIN PROJECT/PROGRAM lines** & have them reflected on the Unit Roll Up?

1. Navigate to the Staff Worksheet you want to add a new **MAIN Project/Program line.**

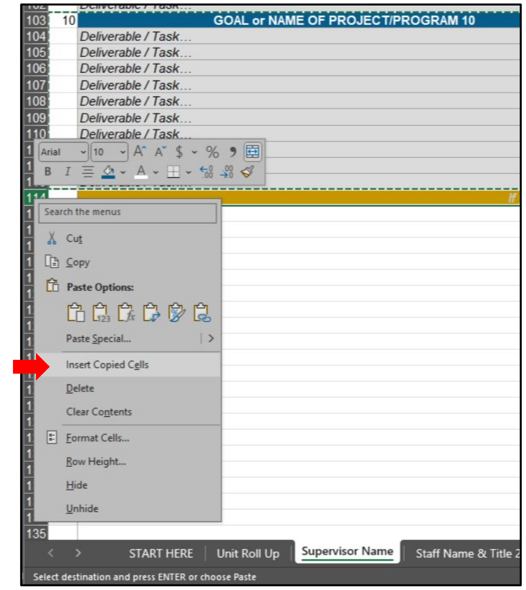
2. Scroll down, and select the last **Blue line** on the sheet, along with the 10 subsequent task lines. It doesn't matter if the information in it is not what you want. Do this by selecting the **Row Number of the blue line** (on the left side of the Excel window), shift, and then the **Row Number of the last task line**.



3. Copy these rows, either by typing "ctrl + C" on your keyboard, or by right clicking in the selection, and clicking "Copy".



4. Scroll down, and right click the Row Number (on the left side of the Excel window) of the Yellow highlighted bottom row.
5. Select "Insert Copied Cells" - This should drop in the copied **Main Project/Program Line** and the subsequent task lines.

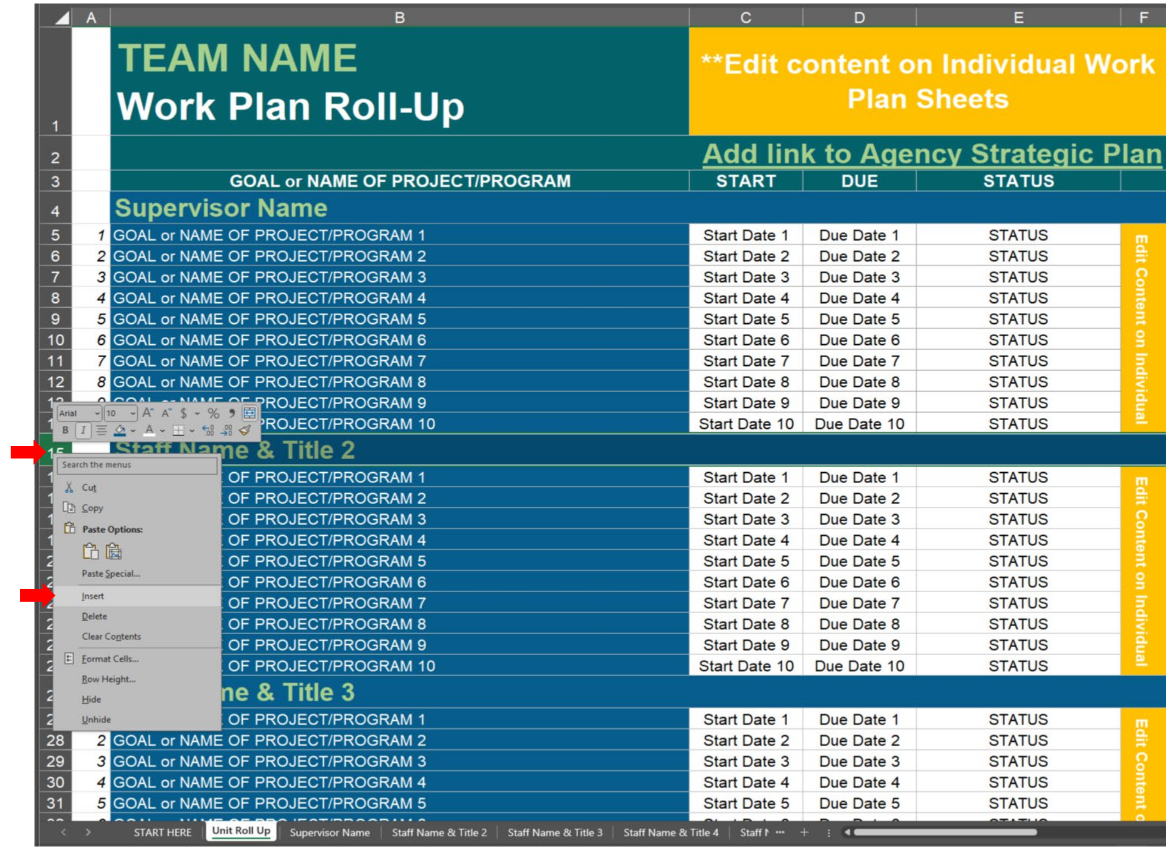


6. Delete out all the data, and input your **new Main Project/Program Name** and tasks where the old data was.

114	11	New Goal or Name of Project Program		New Start Date	New Due Date	STATUS
115		*New Deliverable / Task…*				STATUS
116		*New Deliverable / Task…*				STATUS
117		*New Deliverable / Task…*				STATUS
118		*New Deliverable / Task…*				STATUS
119		*New Deliverable / Task…*				STATUS
120		*New Deliverable / Task…*				STATUS
121		*New Deliverable / Task…*				STATUS
122		*New Deliverable / Task…*				STATUS
123		*New Deliverable / Task…*				STATUS
124		*New Deliverable / Task…*				STATUS

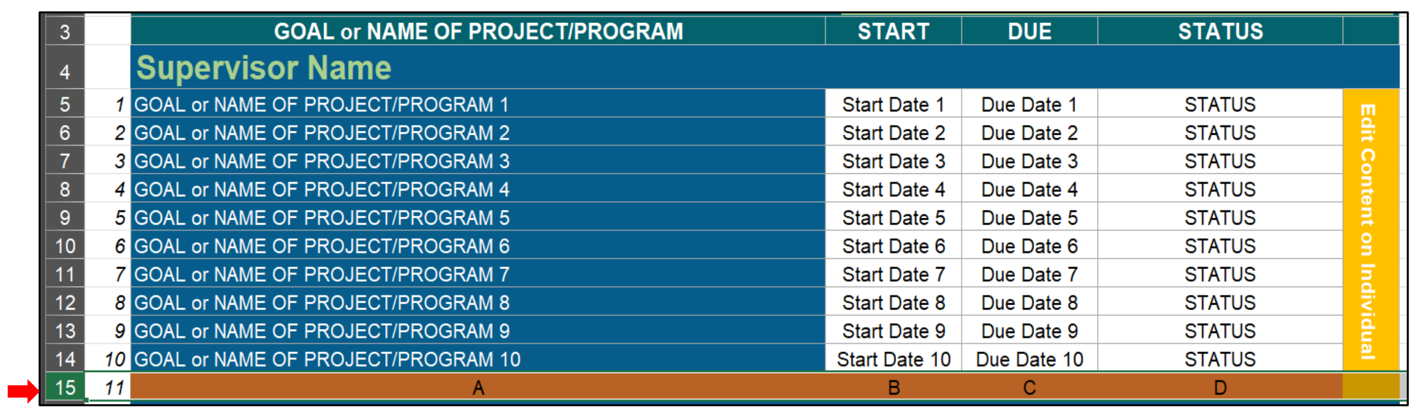
7. To get this new information to show up on the Unit Roll Up overview, navigate to the “Unit Roll Up” Worksheet.

8. Find the Staff Name & Title section that you just added to.
9. Right click on the row beneath their existing last **Main Project/Program**. Click "Insert".



Now to add "References" to the worksheet where the Main Project/Program will be maintained…

10. Now you'll need to add "References" to the **Main Project/Program line** you added in the Staff's Worksheet… To make it easier to show you where you'll need to input formulas, I've highlighted row 15 in the screenshot below and labeled cells A, B, C, & D. This orange row would be the row we just added in the last step.



- The formula we use to refer a cell on this “Unit Roll Up” worksheet to another cell on an individual Staff Name/Title worksheet is called a “Reference”. To get these cells to accurately reflect a new Main Project/Program line you add, you’ll want to use the following general formula:
  “**= ‘WORKSHEET NAME’!Cell Number**” *(you don’t need to type the quotation marks).*

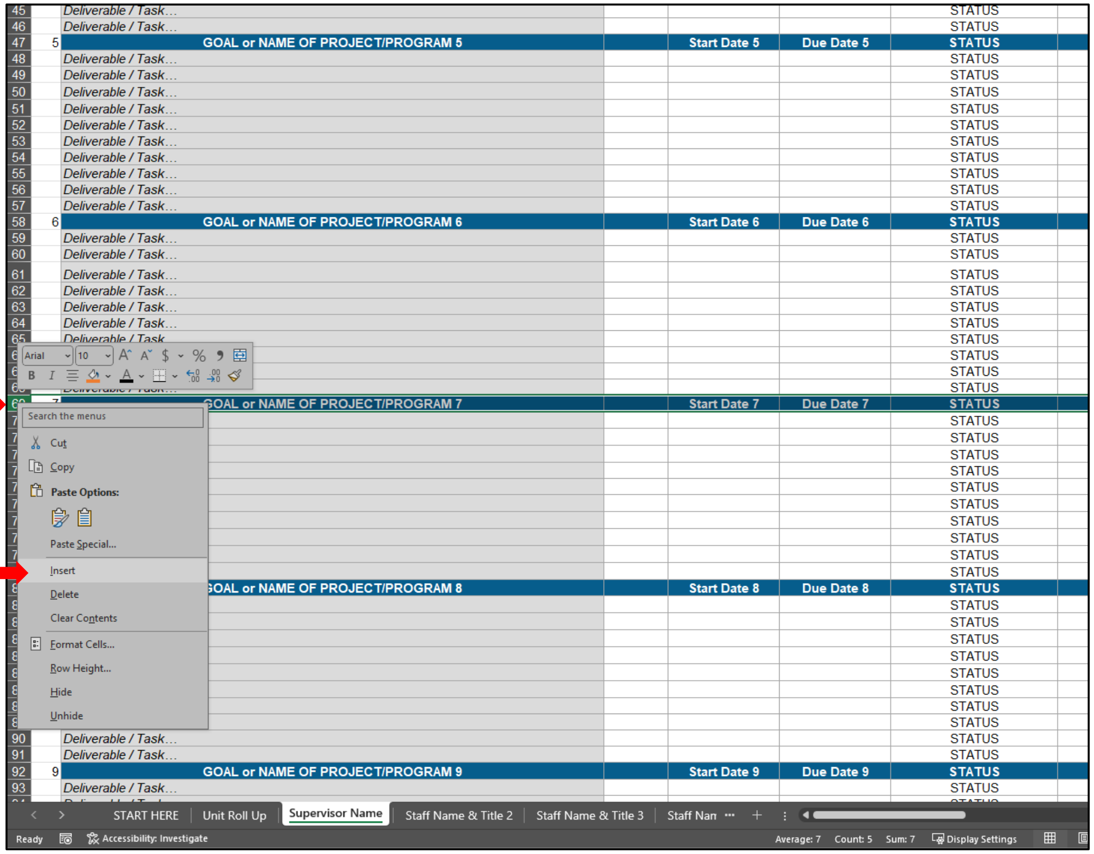
- Simply start by selecting the cell you want to start with – for example, **let’s start with A above.**
  - Select the cell that is labeled as “A” in the above image – we want to reflect the **new Main Project/Program Title** here.
    - Type “=”, then select the worksheet you want to reference, then scroll to the **new Main Project/Program Name cell**. Select the cell, and press “Enter” on your keyboard. This should automatically take you back to the Unit Roll Up sheet, and the information where A used to be should reflect what you entered in the worksheet/cell you’re referencing.
  - **Now in B,** follow the same steps, but…
    - Type “=”, then select the worksheet you want to reference, then scroll to the **new Start Date cell**. Select the cell, and press “Enter” on your keyboard.
  - **For C…**
    - Type “=”, then select the worksheet you want to reference, then scroll to the **new Due Date cell**. Select the cell, and press “Enter” on your keyboard.
  - **And lastly, for D…**
    - Type “=”, then select the worksheet you want to reference, then scroll to the **new Status cell**. Select the cell, and press “Enter” on your keyboard.

11. Your “Unit Roll Up” worksheet should now accurately reflect the data of the **new Main Project/Program line**.
Without the orange though, as the orange is strictly to help call out the new row in this FAQ.

3		GOAL or NAME OF PROJECT/PROGRAM	START	DUE	STATUS	
4		Supervisor Name				
5	1	GOAL or NAME OF PROJECT/PROGRAM 1	Start Date 1	Due Date 1	STATUS	Edit Content on Individual
6	2	GOAL or NAME OF PROJECT/PROGRAM 2	Start Date 2	Due Date 2	STATUS	
7	3	GOAL or NAME OF PROJECT/PROGRAM 3	Start Date 3	Due Date 3	STATUS	
8	4	GOAL or NAME OF PROJECT/PROGRAM 4	Start Date 4	Due Date 4	STATUS	
9	5	GOAL or NAME OF PROJECT/PROGRAM 5	Start Date 5	Due Date 5	STATUS	
10	6	GOAL or NAME OF PROJECT/PROGRAM 6	Start Date 6	Due Date 6	STATUS	
11	7	GOAL or NAME OF PROJECT/PROGRAM 7	Start Date 7	Due Date 7	STATUS	
12	8	GOAL or NAME OF PROJECT/PROGRAM 8	Start Date 8	Due Date 8	STATUS	
13	9	GOAL or NAME OF PROJECT/PROGRAM 9	Start Date 9	Due Date 9	STATUS	
14	10	GOAL or NAME OF PROJECT/PROGRAM 10	Start Date 10	Due Date 10	STATUS	
15	11	New Goal or Name of Project Program	New Start Date	New Due Date	STATUS	

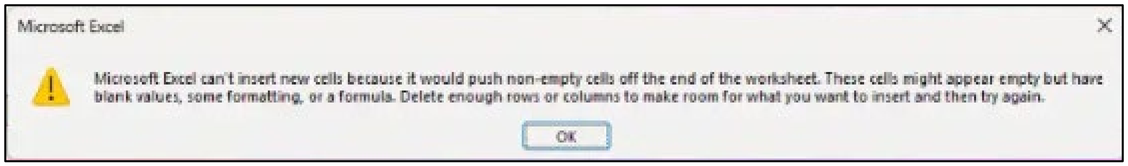
How do I add **more task lines** beneath a main project/program?

1. Since there are no formulas reflecting these details on another worksheet, adding more task lines beneath a **main project/program line** is simple.
2. Navigate to your worksheet, scroll down to the **project/program section** you want to add deliverable/tasks to.
   a. *For this example, we'll add rows to* ***main Project/Program # 6*** *in the screenshot to the right…*
3. Right click on the row number (on the left side of the Excel window) beneath the last deliverable/task spot – which is also above the next **main project/program line**.
   a. Select "Insert"
   b. Do this as many times as you need till you have enough rows for the amount of tasks you want to show.



Occasionally, Excel may give you a disclaimer that says:

"Microsoft Excel can't insert new cells because it would push non-empty cells off the end of the worksheet. These cells might appear empty but have blank values, some formatting, or a formula. Delete enough rows or columns to make room for what you want to insert then try again."



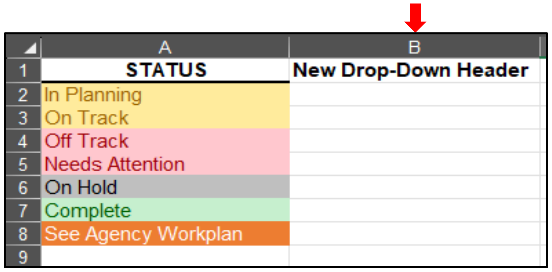
To troubleshoot…

1. Move to the last row of your data (for each worksheet, this would be below the yellow disclaimer bar about adding new main rows).
2. Move down one more row, and select the first cell in that row. Then press Shift + Spacebar. (This will select the whole row).
3. Press Shift + Ctrl + Down Arrow (This will expand the current selection to the bottom of the spreadsheet).
4. Press Ctrl + - (This will delete those rows).

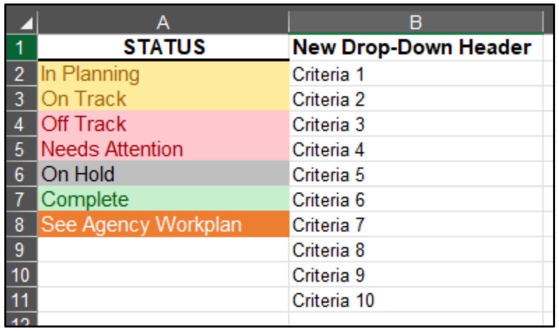
Then try to insert rows using the instructions above. If that still does not work, reach out to Organizational Development at OrganizationalDevelopment@cityofmadison.com for assistance.

How do I add more **drop-down lists?**

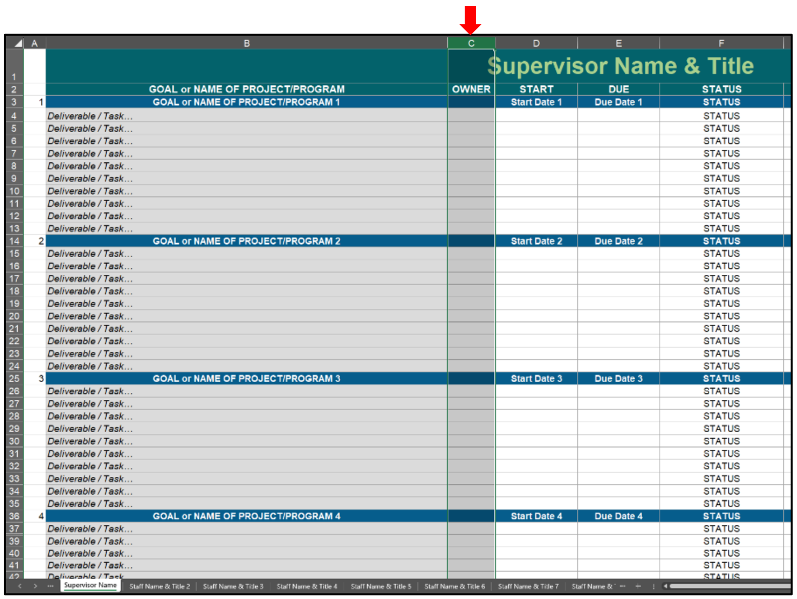
If you like how the “Status” column has a drop-down list function and want to implement this in more areas of your Team Work Plan, here are simple steps to create new drop-down menus.



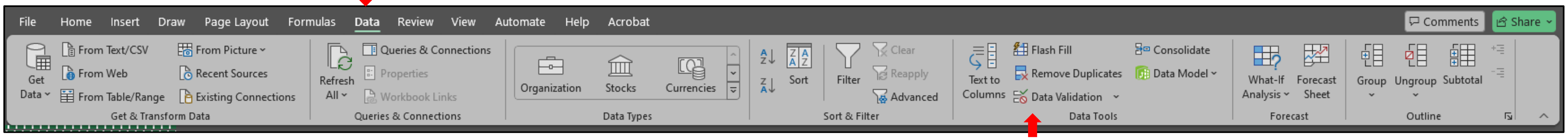
1. Navigate to the “Validation” worksheet in your workbook.
    a. You’ll notice the Status drop-down menu items here, and I would recommend you use this space for any additional drop-down lists you want to create.
2. To start a new drop-down list, I suggest you type in a header for what the drop-down list is on the top row. Insert next to the existing “Status” column.

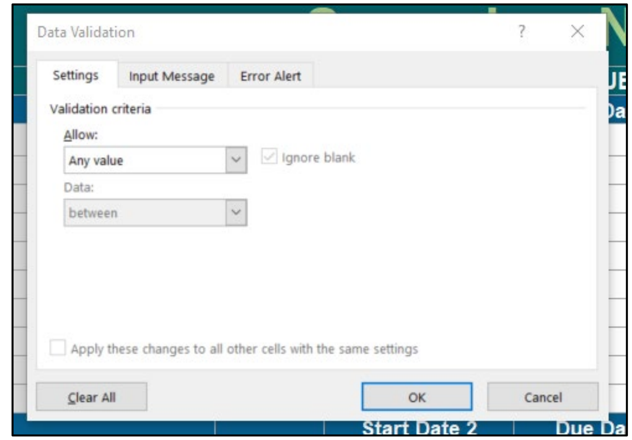


3. Below your new header, add in the criteria you want folks to be able to select within the drop-down menu.



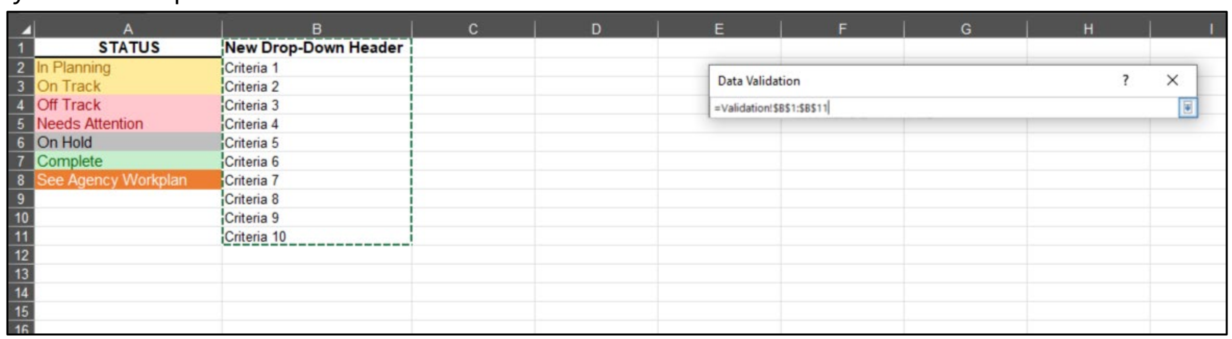
4. Navigate to the worksheet you want to add the drop-down menu option to – *For this example, we’ll use the “Supervisor Name” worksheet.*
    a. If you want a whole column to have the drop-down menu – like the existing “Status” column, **select the column you want to add this function to.** – *For this example, we’ll use the “Owner” column.*
    b. On the toolbar, navigate to the **“Data”** tab.
    c. Select the **“Data Validation”** button.





d. A Data Validation window will appear.
   i. Select **"List"** under the **"Allow"** drop-down
   ii. Select the arrow button in the new **"Source"** field that pops up when you select List.
      1. This will minimize the Data Validation window and allow you to navigate within your workbook.

   iii. Select the **"Validation"** worksheet.
      1. This will show the sheet with your new drop-down list items.
   iv. Select the top cell with your **New Drop-Down Header,** then **Shift,** then select the last item in your list. (This will allow you to select the whole list – like in the screenshot to the right.
   v. Select the arrow button to expand the Data Validation window again.
   vi. Click **"OK"**



e. This will automatically take you back to the sheet you were adding the drop-down menu to, and the drop-down menu should be ready to roll.

To delete a drop-down menu from a column…

1. Select the column you want to remove the drop-down menu from.
2. Navigate to the **"Data"** tab.
3. Select the **"Data Validation"** button
4. Select the **"Clear All"** button in the bottom right corner of the Data Validation window.
5. Click **"OK"**