

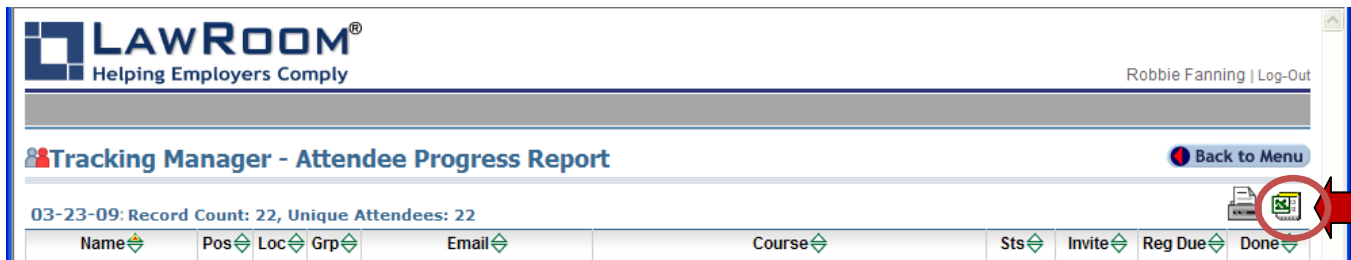
INSTRUCTIONS FOR TRACKING MANAGERS

Part I: Responding to SHPO Canvass Request

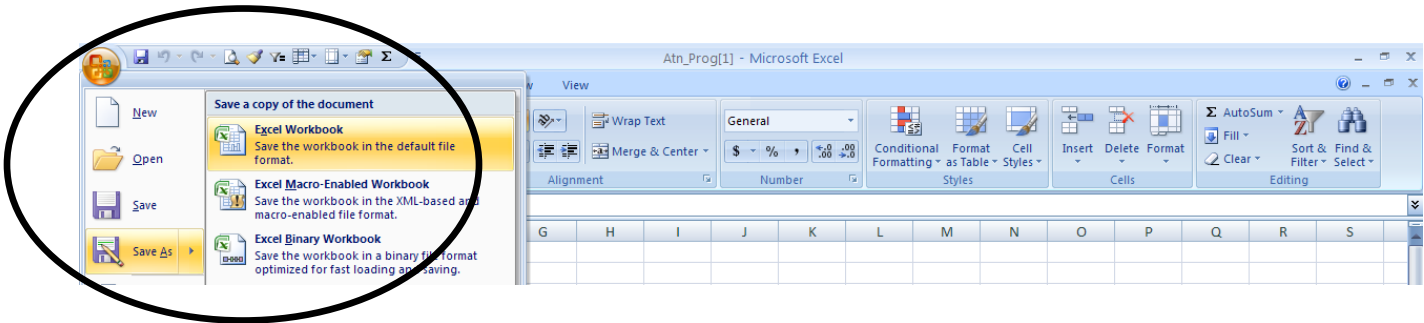
1. The email you received called “Your Tracking Manager Report” from “Stanford University” has a link to your LawRoom report. It’s at the bottom of the message. Click it.

Example: To open the report now, click:
-> <http://el.lawroom.com/t.aspx?>

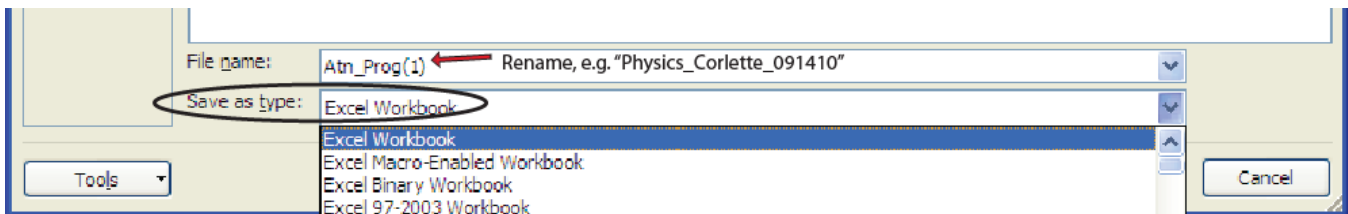
2. Take a look at the report, then click on the Excel symbol in the upper right-hand corner.



3. Open the report. It will be a spreadsheet, but in an inconvenient (.csv) format. Using *Save As*, change the report type to Excel Workbook. If you have difficulty with this, please call 5-0646.



4. Please change the name of the file from “Atn_Prog(1)” to *DeptName_YourName_Date*



Viewing the report in Excel:

The screenshot shows an Excel spreadsheet titled 'Atn_Prog(1)for TM_Instrs.xlsx'. The spreadsheet contains an 'Attendee Progress Report' with the following data:

Record Co	Unique Attendees: 11	Name	Position	Location	Group	Email	Course	Status	Invite Dat	TR Reg D	Done Date
1	Andrews, Staff	Staff	School of	Dept. X	andr@stai	2009-10 St	Done	4/9/2009	#####	#####	
2	Bard, Mari	Faculty	School of	Dept. X	barrmm@-	Future	1/5/2011	#####	-		
3	Beach, Pe	Faculty	School of	Dept. X	pbeach@:	2009-10 St	Done	4/9/2009	#####	#####	
4	Fracus, He	Other Tea	School of	Dept. X	frac@stan	2009-10 St	Done	4/9/2009	#####	#####	
5	Folder, M.	Faculty	School of	Dept. X	fold@star	2009-10 St	Done	4/9/2009	#####	#####	
6	Jacquard, Faculty	Faculty	School of	Dept. X	french@si	2009-10 St	Pending	8/1/2010	#####	-	
7	Movesaro	Staff	School of	Dept. X	mover@si	2009-10 St	Past Due	6/9/2010	#####	-	
8	Mountain	Staff	School of	Dept. X	mountn@	2009-10 St	Done	4/9/2010	#####	#####	
9	Ninja, Tur	Faculty	School of	Dept. X	turlock@s	2009-10 St	Done	4/9/2009	#####	#####	
10	Smith, Joe	Staff	School of	Dept. X	smith@st.	2009-10 St	Done	4/9/2009	#####	#####	
11	Waters, M	Staff	School of	Dept. X	mudwat@stanford.	€	NotReg	3/9/2009	#####	-	

The text box on the right contains the following text:

Modifications to make:

- Expand columns to show data fully.
- Put your name and phone number at the top.
- Sort by "Position" column (Faculty/Staff).
- Create a column for your comments (or clear and use the "Course" column.)

5. LawRoom reports cannot separate faculty from staff, so both are listed on your report even though you may not be tracking both. You may sort Col. B, "Position," in order to group the names. (If you need help with sorting, consult Excel Help or give us a call at 725.0646.)
6. Highlight the row of names to be deleted; **do not remove them**. Briefly explain the reason (e.g., *no longer supervising, has left Stanford, retired, moved to a new job at Stanford, not in this department, etc.*).
7. Highlight anyone who will be on leave during most or all of 2012, providing departure and return dates.
8. Highlight any errors in email, job position, spelling, etc., with a brief comment.
9. At the bottom of the list, **add** the full names and email addresses of faculty or staff supervisors who are currently in your group but are **not** on the list. Include a brief comment telling us if they
 - are a new employee at Stanford
 - have relocated from within Stanford
 - were recently promoted
 - should be on the training list but aren't, etc.

10. Include those in the “Other Teaching” category who meet the criteria for required training. To review the descriptions of who is a supervisor for AB1825 training, see: http://harass.stanford.edu/training_whois.html

11. Send your report to us at shpo-training@stanford.edu .

Sample revised report:

Name	Position	Location	Group	Email	COMMENT	Status	Invite Date	TR Reg Due Date	Done Date
Andrews, Susan	Staff	School of Humanities and Sciences	Dept. X	andr@stanford.edu		Done	4/9/2009	12/1/2009	5/12/2009
Bard, Marylou	Faculty	School of Humanities and Sciences	Dept. X	barrmm@stanford.edu	This person is not in my dept.	Future	1/5/2011	2/15/2011	-
Beach, Pebble	Faculty	School of Humanities and Sciences	Dept. X	Pbeach@stanford.edu		Done	4/9/2009	12/1/2009	5/5/2009
Fracus, Henry	Other Teaching	School of Humanities and Sciences	Dept. X	frac@stanford.edu	on leave 9/1/10-8/31/11	Done	4/9/2009	12/1/2009	6/15/2009
Folder, Mary	Faculty	School of Humanities and Sciences	Dept. X	fold@stanford.edu		Done	4/9/2009	12/1/2009	5/4/2009
Jacquard, Minot	Faculty	School of Humanities and Sciences	Dept. X	french@stanford.edu		Pending	8/1/2010	11/1/2010	-
Movesaround, Audrey	Staff	School of Humanities and Sciences	Dept. X	mover@stanford.edu	Transferred to Dept. Y 8/1/10	Past Due	6/9/2010	10/9/2010	-
Mountain, Top	Staff	School of Humanities and Sciences	Dept. X	mounntn@stanford.edu		Done	4/9/2010	7/1/2010	5/7/2010
Ninja, Turlock	Faculty	School of Humanities and Sciences	Dept. X	turlock@stanford.edu		Done	4/9/2009	12/1/2009	8/31/2009
Smith, Joe	Staff	School of Humanities and Sciences	Dept. X	smith@stanford.edu		Done	4/9/2009	12/1/2009	9/9/2009
Waters, Muddy	Staff	School of Humanities and Sciences	Dept. X	mudwat@stanford.edu	Left Stanford, 8/1/10	NotReg	3/9/2009	6/9/2009	-
NAMES TO ADD:									
Faculty, Famous	Faculty	School of Humanities and Sciences	Dept. X	famous@stanford.edu	Should be on our list--has been here a long time				
Jones, Margie	Faculty	School of Humanities and Sciences	Dept. X	margj@stanford.edu	Hired 9/1/10				
Smith, Hugh	Staff	School of Humanities and Sciences	Dept. X	husmi@stanford.edu	Promoted 10/1/10				

Do not hit Reply to the initial email. That sends it to LawRoom, not to SHPO.

➔ If you have **no changes** to make to your report, please let us know that in a short email.

Please contact **Michaela Hackford** with any questions or concerns:

Phone: 725-0646

Email: shpo-training@stanford.edu