

From spreadsheet tracking to an app-like business system

Sample manufacturing company
Workforce compliance workflow

THE PROBLEM

Important work was buried in rows.

- Credential dates, employee details, and requirements lived in separate spreadsheet-style views.
- Users had to know where to look before they could decide what needed attention.
- Editing raw tables increased the chance of accidental changes and inconsistent records.

THE BUILD

A guided Excel application.

- A command center summarizes current, expiring, expired, and missing requirements.
- Clickable status areas open the exact records behind each number.
- Company setup, employee maintenance, imports, and certifications use guided screens.

Employee ID	Name	Position	Service	Required Certification	Status	Date
22-0001	John Smith	Production Supervisor	10 Years	OSHA 10-Hour	Missing	07/21/2026
23-0002	Jane Doe	Production Supervisor	5 Years	OSHA 10-Hour	Missing	07/21/2026
24-0003	Mike Johnson	Production Supervisor	15 Years	OSHA 10-Hour	Missing	07/21/2026
25-0004	Sarah Williams	Production Supervisor	8 Years	OSHA 10-Hour	Missing	07/21/2026
26-0005	David Brown	Production Supervisor	12 Years	OSHA 10-Hour	Missing	07/21/2026
27-0006	Emily Davis	Production Supervisor	6 Years	OSHA 10-Hour	Missing	07/21/2026
28-0007	Robert Miller	Production Supervisor	9 Years	OSHA 10-Hour	Missing	07/21/2026
29-0008	Lisa Wilson	Production Supervisor	7 Years	OSHA 10-Hour	Missing	07/21/2026
30-0009	James Taylor	Production Supervisor	11 Years	OSHA 10-Hour	Missing	07/21/2026

3

EXPIRED

3

EXPIRING

9

MISSING

1 click

TO DETAILS

DEMONSTRATED OUTCOME

The workbook now tells the user what to do next.

- The command center exposes priorities before the user enters the data.
- Drill-down views preserve the context needed to resolve an issue.
- Guided screens create a product-like experience while retaining familiar Excel delivery.

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