Manual
NLTP Activities Reporting Tool
(web release version 1.0)

Contents

1 Introduction

The NLTP Activities Reporting Tool generates reports containing tables based on project allocation data in LTP Online.

All relevant data from 2009 onwards is available. Updated data will be included in the tool after a NZTA review. The user will be able to report on progress between reviews.

The tool is an Excel workbook. The workbook contains a macro that automatically runs when the workbook is opened.

2 Before Running the Application

To allow the program to run properly it is necessary to **close all Excel applications.**

As the program is an Excel based application itself it could confuse any open Excel workbooks with the one containing the NLTP Data. To ensure this does not happen, please close all Excel applications before running the NLTP Activities Reporting Tool.

You are now ready to use the NLTP Activities Reporting Tool.

3 Starting up

The tool will start automatically after the link on web site is activated.

a. Opening/Saving the Tool

After clicking on the link the user has to decide of it wants to Save or Open the application.

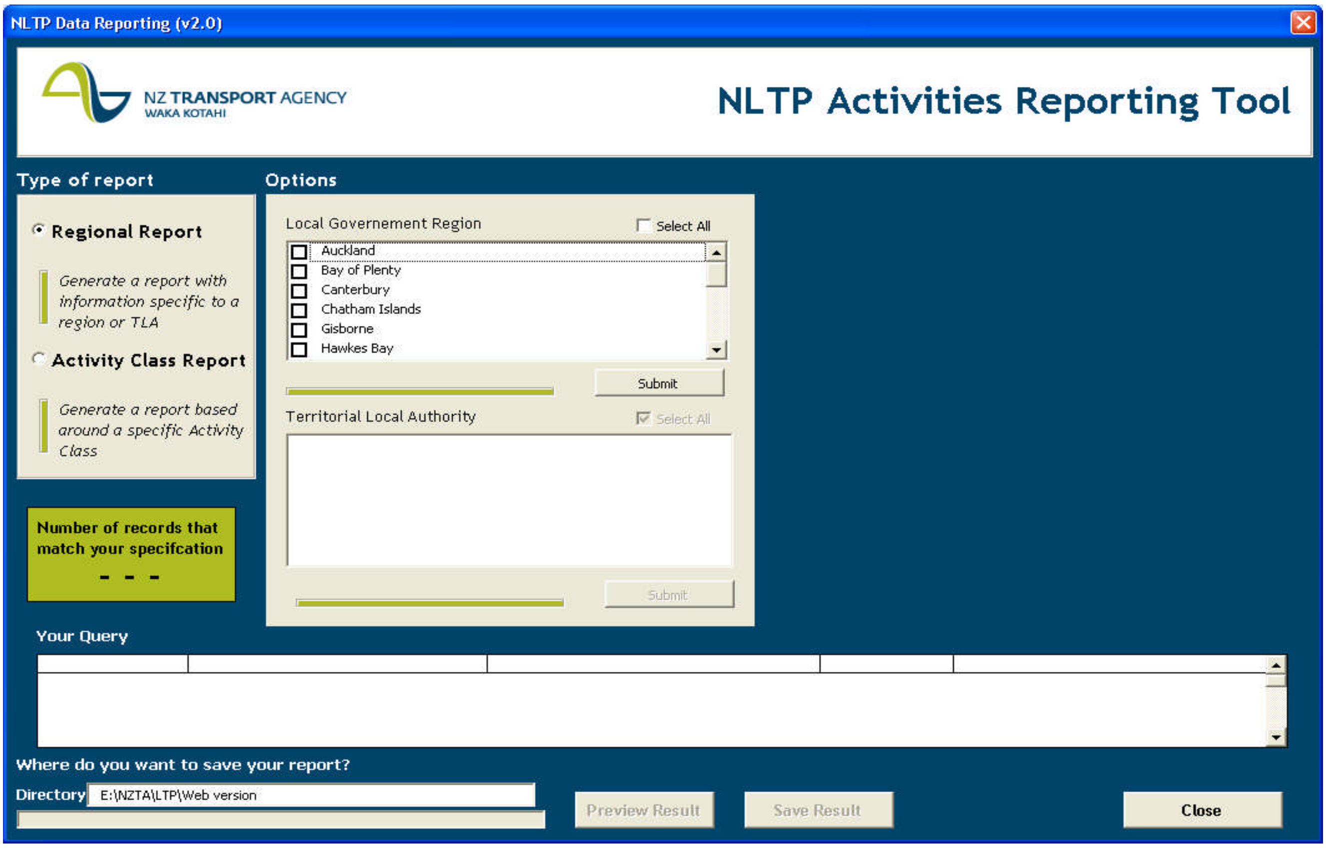
1. If the user chooses <u>Open</u> the tool will run on the internet and will extract data from the NZTA central server for each set of tables.
2. If the user chooses <u>Save</u> a copy of the tool will be downloaded on the user's personal computer. Although the tool will work fine, the data that is used for tables is static and cannot be updated. There is a risk that outdated information is used as the information tends to change over time (after each review).

It is recommended to <u>Open</u> the application as this will ensure the latest data is used for all tables.

Note: After clicking 'Open' or 'Save' the user might be asked to 'enable Macros'. This is dependent on the settings of the security level of the user's computer. The tool will only function if the Macros are enabled.

b. Opening Screen

When the Tool starts the following screen will appear:



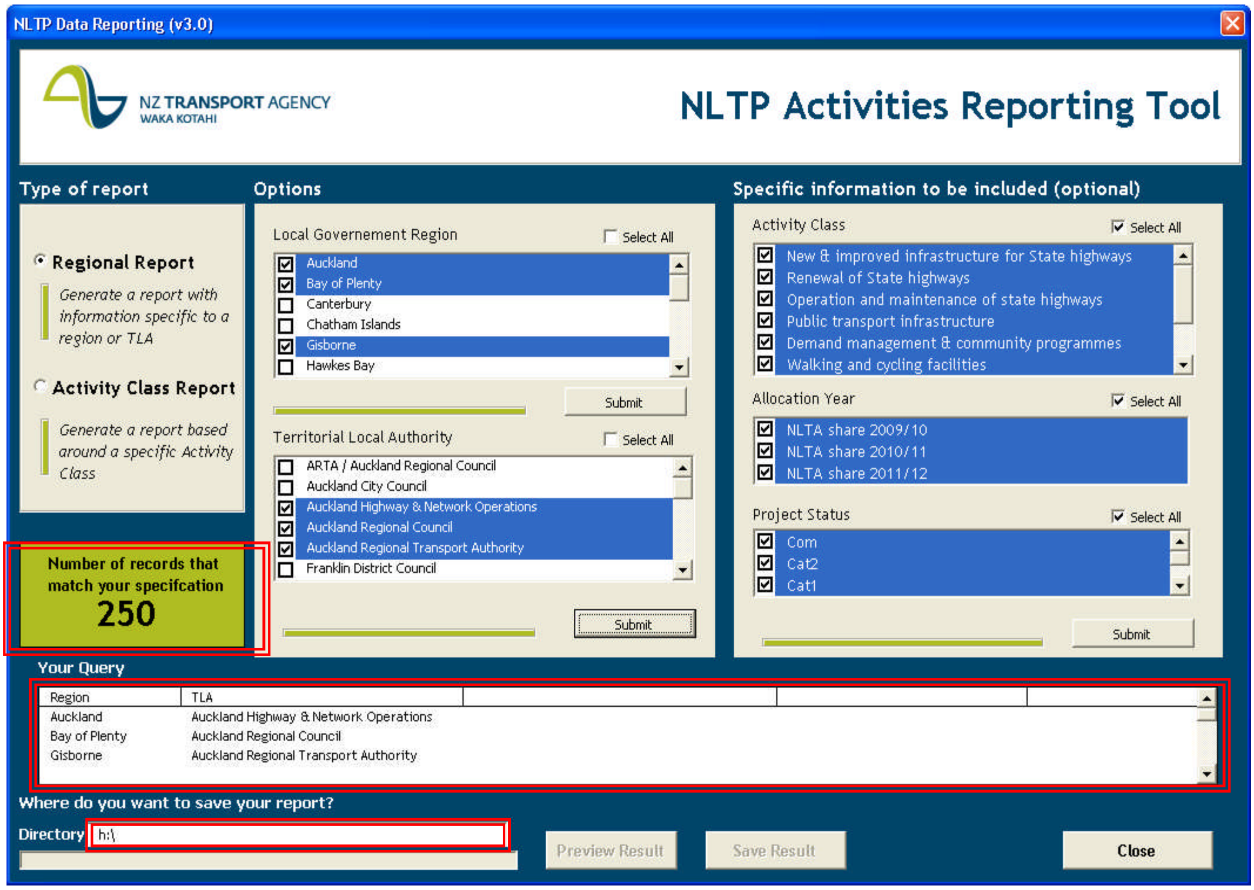
Picture 1 – Start up screen

This is screen is the front end of the application and allows the user to determine the type tables it wants to generate.

All parameters should be set within this screen before the Word and/or Excel document is created.

4 General Screen Information

The main screen contains a few fields that are useful for the user throughout the entire process of generating a NLTP Activities report.



Picture 2 – General Screen Information

1- The green box on the left keeps track of the number of records (projects) that match your specification.

2- The white box labelled 'Your Query' keeps track of the fields you have selected for your query.

3- The box 'Directory' allows you to enter the location you want to save your report in. The directory path should always have the following structure *"DRIVE' + :\ + 'DIRECTORY '\"*

Please ensure the directory path is entered properly before saving any results.

5 Setting the parameters

The user should now set different parameters before the Word and/or Excel document containing the result table is created.

a. Type of Report

This is the field where the user can choose the type of report it wants to generate. The types of reports are all based around the same data sources. Each type of report provides a different start point for generating a report.

The following can be reported on:

Type of Report	Explanation
1 – Regional Report	The user should choose this option when it wants to report on regional data. It allows to report on projects over multiple activities within all selected regions
2 – Activity Class	The user should choose this option when it wants to report on activity classes. It allows to report on projects over multiple regions within all selected activity classes

Table 1 –Type of Report

b. Options

The following options need to be chosen in sequence to allow for the tool to generate a result!

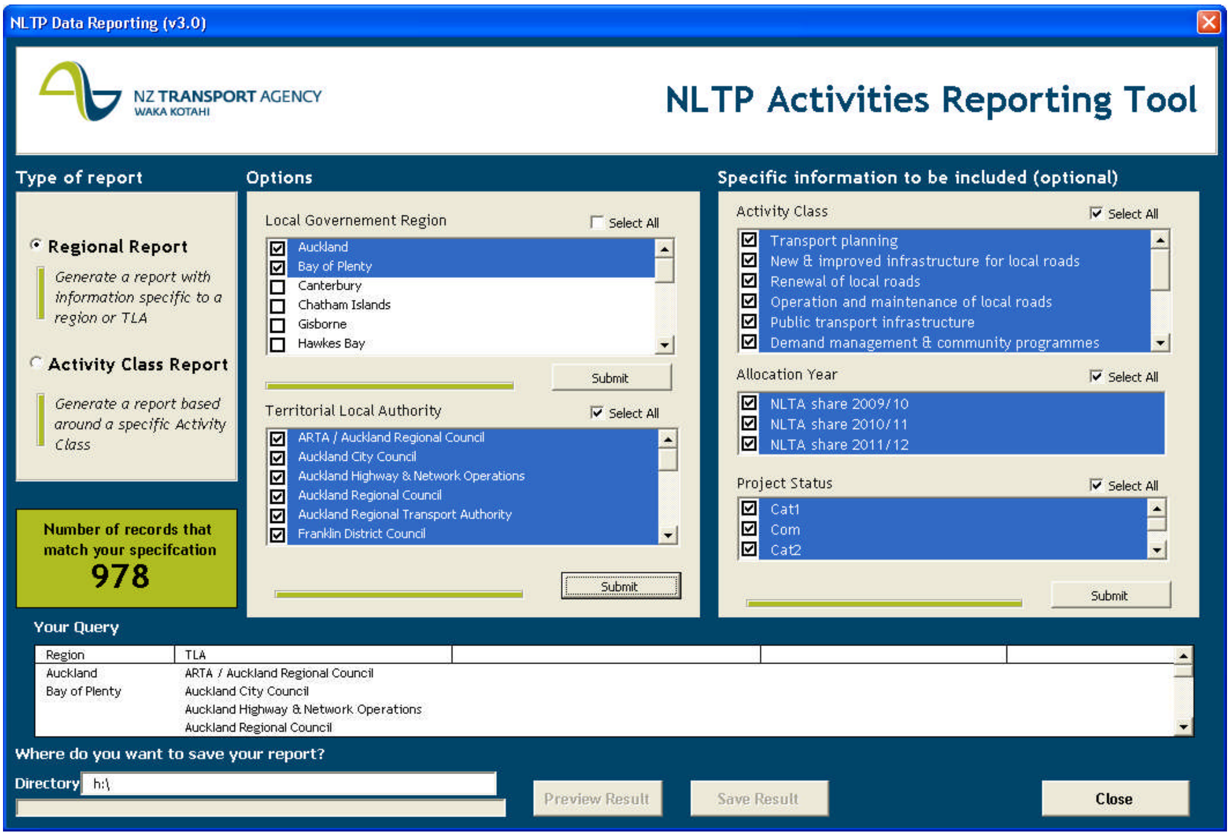
*i. When **Regional Report** is selected*

The user can select the regions it wants to report on.

Option	Explanation
Local Government Region	Any number of regions can be chosen to be included in the table
Territorial Local Authority	This box will show all TLAs based on the selected Local Government Regions. Any number of Territorial Local Authorities can be chosen to be included in the table. By default, all TLAs will be included

Table 2 –Type of Options (1)

After submitting the Territorial Local Authority the following section on the base screen will appear:



Picture 3 – General Screen after TLA information is submitted

NB: All data in the boxes on the right are based on the selected TLAs. The boxes will only include information relevant to those Territorial Local Authorities

Sub-Option	Explanation
Activity Class	Any number of regions can be chosen to be included in the table
Allocation Year	This box will show all project Allocation Years based on the selected Local Government Regions. When an Allocation Year is selected all projects that have money allocated for that year will be included. By default, all Allocation Years will be included
Project Status	This box will show all different statuses of all projects based on the selected Local Government Regions. Any number of Project Statuses can be chosen to be included in the table. By default, all Project statuses will be included

Table 3 –Type of Sub-Options

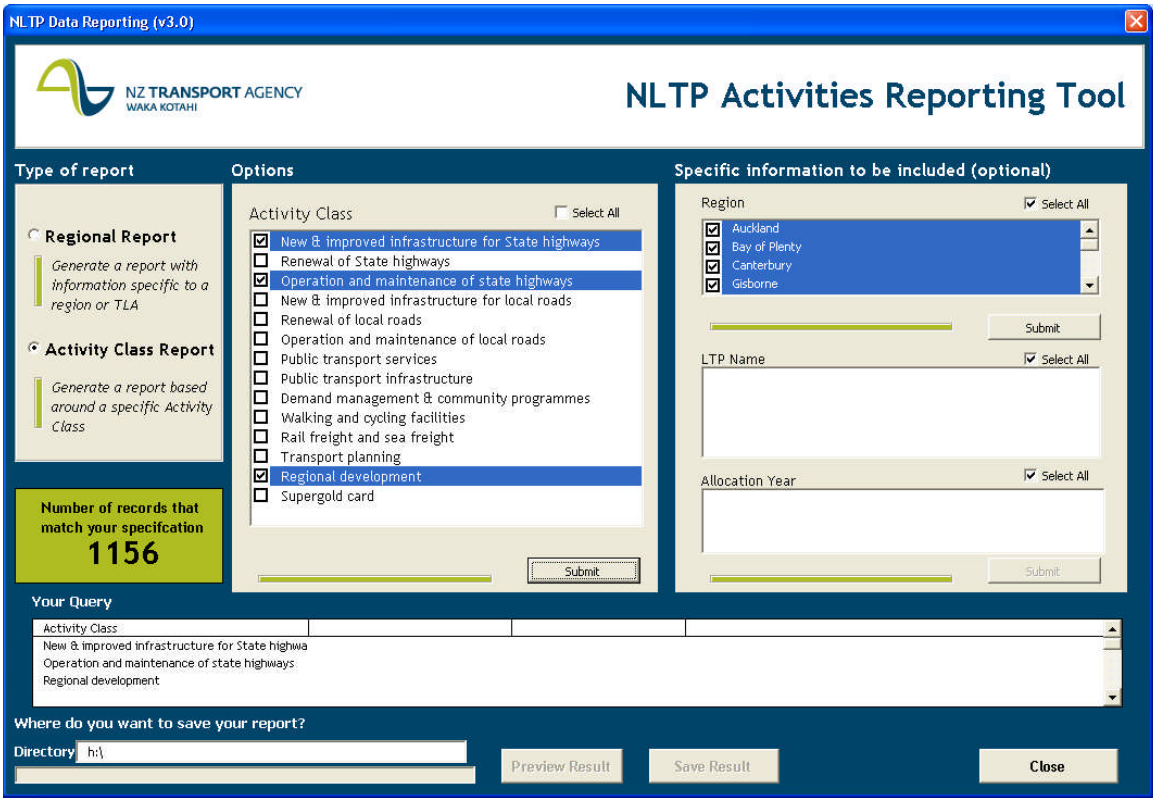
ii. When Activity Class Report is selected

The user can now select the activity classes it wants to report on.

Option	Explanation
Activity Class	Any number of activity classes can be chosen to be included in the table

Table 4 –Type of Options (2)

After submitting the Activity Class the following section on the base screen will appear:



Picture 4 – General Screen after Activity Class information is submitted

NB: Data in the box 'Regions' on the right is based on the selected Activity Classes. The boxes will only include information relevant to those Activity Classes.

Sub-Option	Explanation
Region	Any number of regions can be chosen to be included in the table
LTP Name	This box will show all TLAs based on the selected Regions. Any number of Territorial Local Authorities can be chosen to be included in the table. By default, all TLAs will be included
Allocation Year	This box will show all project Allocation Years based on the selected Local Government Regions. When an Allocation Year is selected all projects that have money allocated for that year will be included. By default, all Allocation years will be included

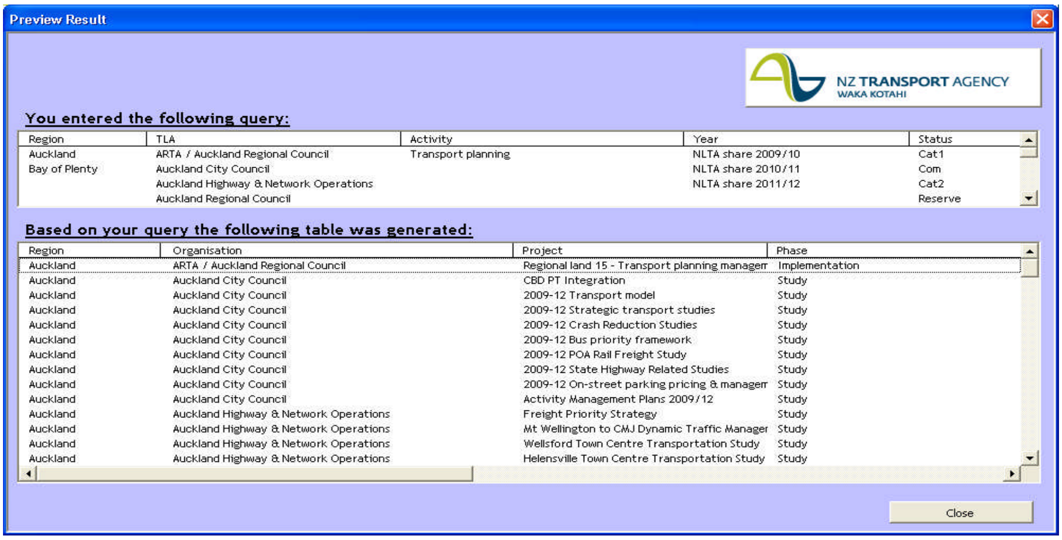
Table 4 –Type of Sub-Options (2)

6 Generated Word/Excel document

After setting all parameters the ‘Preview Data’ and ‘Save Data’ buttons on the bottom of the screen will be enabled.

a. Preview Data

The preview Data button will trigger the following screen to appear:

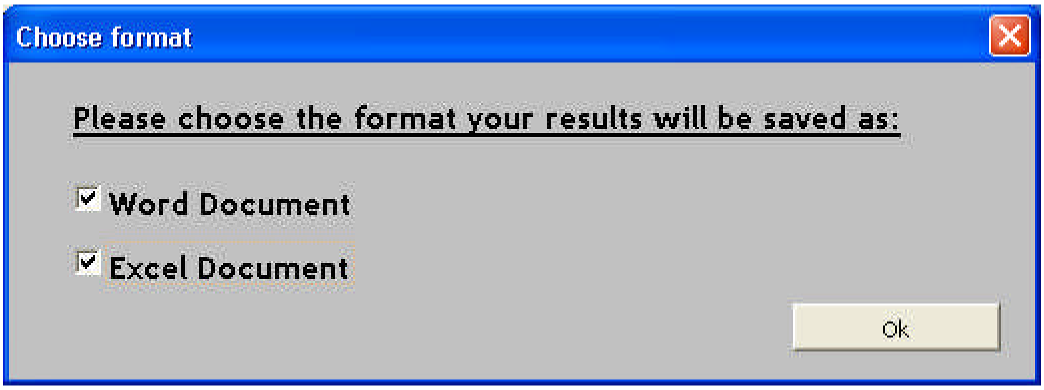


Picture 5 – Preview Result Screen

The screen shows the user selected query as well as the results as it will be saved. The preview option is useful if the user wants to include or exclude different projects based on the output. The user has the opportunity to revisit the parameters settings after previewing the data.

b. Save Data

After choosing 'Save Data' the user will be provided with the option to choose the format in which the data will be saved.

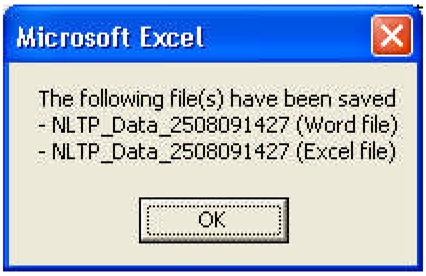


Picture 6 – Choose format Screen

The user can choose to save the output as Word and/or Excel document.

Either of the option will generate a document contain the exact same information as shown on the preview screen. The Excel document has as advantage that it allows the user to manipulate the data.

The following message will appear after the Word and/or Excel document are generated:



Picture 7 – Saved files Result Screen

The directory where these files can be found is determined by the directory path as input by the user (see section 4).

7 After Closing the Application

When the user is finished using the application it can be terminated by clicking the 'Close' button or the cross in the right top corner.

Dependant on the settings on the computer the user will be asked to save any changes in the workbook. The No button should be selected as the workbook should not be altered.

Note: **Make sure you close Excel before you run the application again**.

8 Data Sources Used

The most up-to-date information from LTP Online is used for all calculations. As soon as reviews are completed in LTP Online and approved by the National Office the web data is updated. The created tables are therefore always based on the latest approved data.

9 Author

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