

S1-Simple-50 PROGRAM OPERATING INSTRUCTIONS

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Office 2007/Excel 2007 Note:

This Excel workbook was created with Excel 2003 and if used in Excel 2007 it needs to be saved as an Excel 97/2003 workbook with macros. Excel 2007 will warn you that some information may be lost, but since this workbook does not use any unique Excel 2007 features, none will be lost.

Navigation Note:

This spreadsheet has several sheets and there is room for only a limited number of sheet tabs at the bottom of the screen. You can display additional sheet tabs by clicking on the directional arrows on the left of the sheet tabs. Another way to display additional tabs is to hold the mouse cursor over the directional arrows and click the right mouse button. You can now select the sheet of interest from the table of sheet names. You can also go from one sheet to the next by holding down the control key and pressing the Page Down or Page Up key on the keyboard.

If you find that you do not need all of the sheets, you can hide the unwanted ones. Do not delete them, for it might corrupt the spreadsheet logic. To hide a sheet, go to the sheet, select **F**ormat, **S**heet, **H**ide. To unhide a sheet, select **F**ormat, **S**heet, **U**nhide, and then select the sheet from the menu.

The Frequently Asked Questions (FAQ) Sheet

This sheet contains Excel tips and pointers related to basic Excel operations that may be helpful to you in using this spreadsheet..

I. INTRODUCTION

Please Read the License on the License Sheet

This spreadsheet provides a simple monthly calendar where you can assign up to 10 employees to daily shifts or tasks. Up to 50 employees and tasks can be defined and used in the daily assignments. A monthly calendar is created that you can print for distribution or send to your employees by e-mail.

II. INPUT SHEET

Two tables are provided for you to list up to 50 employees and 50 shifts or tasks. You can define both shifts and tasks on this sheet. There is also a column where you can specify the number of hours associated with each shift or task. You can leave this column blank if you want to.

The "Sort Employee Names" macro at the top of the sheet will alphabetically sort the employee names and also sort their names and e-mail addresses on the E-Mail sheet. If you delete an employee name and then sort the list to put the blank cell at the bottom of the list, the deleted employee e-mail address will still be on the E-Mail sheet (below your active employees). You will need to manually delete the extra e-mail address to prevent the former employee from receiving the ECalendar.

III. SCHEDULING SHEET

Input the schedule start date in the cell at the top of the sheet. The date needs to be the first day of the month and if you input another date, the spreadsheet will convert it to the first day of the month.

Scheduling is done by selecting an employee name from the drop-down menu in the turquoise column and selecting a shift or task assignment from the drop-down menu in the light green column.

You can assign a person more than 1 shift or task and you can assign a shift or task to more than 1 person.

IV. ASSIGNMENTS COUNT SHEET

The table on this sheet shows the total number of shifts and tasks assigned to each person and the total number of hours associated with them.

V. CALENDAR SHEET

The Scheduling sheet is reproduced on this sheet. Macro buttons at the top of the sheet are provided if you want to hide unused rows or unhide all of the rows. You can also select an employee and a shift/task to highlight on the calendar allowing you to easily spot employees and shifts/tasks.

There is also a macro provided for you to use to send the calendar to your employees as an e-mail attachment. The macro copies the calendar to the Ecalendar sheet and then sends that sheet to your employees as a single sheet Excel workbook. If any of your employees do not have the Excel software or another spreadsheet program, they can download a free Excel viewer from Microsoft at:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=c8378bf4-996c-4569-b547-75edbd03aaf0&displaylang=EN>

Your e-mail client will probably alert you that a program is attempting to send a message and you will need to click "Yes" in order to send the message.

The e-mail macro works with all of the Microsoft e-mail clients including Outlook Express, Outlook and Windows Mail. It probably does not work with other e-mail software, but you are free to try.

The print calendar macro will hide unused rows and then print the calendar one time for each employee with a different employee name highlighted on each print. You may want to preview the print after you have run the "Hide Unused Rows" macro to see if you want to change the print orientation from portrait to landscape before you run the print macro.

VI. E-MAIL SHEET

Input your employees e-mail addresses in this table and check the box at the left if you want the calendar sent to that employee. If you want it sent to everyone, you can check just the box at the top of the list.

You can send the calendar to people who are not on your employee list by simply adding the e-mail address below your active employees.

The macro on the Input sheet that sorts employee names will also sort this table so the e-mail address will remain with the employee.

VII. ECALENDAR SHEET

This sheet contains the contents of the Calendar sheet that was copied when you clicked the "Click Here to E-Mail this Calendar to Selected Employees" macro button on the Calendar sheet and is the sheet that will be sent to your employees..

If your employees want to highlight a name or a shift/task on the calendar, they can copy the name or shift/task to one of the boxes at the top of the sheet.

VIII. CAUTIONS

Do not add or delete rows or columns on any of the worksheets, for it may corrupt the spreadsheet logic. Rows and columns may be hidden if you do not need them or do not want to see them.

Be careful if you copy cells on the Scheduling sheet. The drop-down menus are different in the turquoise and the light green cells so don't copy a light green cell to a turquoise one, and visa-versa. Also, the menus are different each week, so don't copy cells from one week to another. If you want to duplicate assignments from one week to another use the Copy and Paste/Special Values technique.

Do not change the name of the Ecalendar sheet. If you do, the e-mail macro will not work.

IX. TECHNICAL SUPPORT

Technical Support is available by phone during normal business hours and by fax or e-mail 24 hours per day.

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