

S10-Crew Maker Instructions

Crew Maker for 5 Jobs and 50 Employees Instructions

Introduction

This spreadsheet allows you to schedule 50 employees to 5 different jobs one day at a time for up to 2 weeks. You can specify up to 10 different groups for your employees and up to 10 different skills that you can assign to them. Each week you can run a macro that saves the current weekly assignments so you will have a permanent record of all weekly assignments for all of your jobs.

Input Sheet

Tables are provided for you to input the names of employee groups such as crew chief, skilled labor, unskilled, etc. and employee skills such as carpenter, electrician, etc. If you enter a group or skill more than once, the cells with the duplicates will turn rose-colored to alert you of the duplicate entry. Employee skill abbreviations (the first letter of the skill) are used on the scheduling menus so each skill needs to begin with a different letter. If you enter two or more skills that start with the same letter, the cells with the duplicate abbreviations will turn rose to alert you of the problem.

Next to the Employee Skills table is a table listing each job and a place for you to select employees that will receive the Weekly Job Schedule via e-mail when the e-mail macro on the Jobs Schedule sheet is run.

Above the employee groups and skills tables is a cell where you need to input the schedule start date. You need to input this date only once because it is updated automatically each week when you run the macro (described below) at the top of the page.

At the bottom of the sheet is a table that summarizes the job information on each of the 5 job scheduling tabs giving the job name, number of weeks the job has been active, the job start date and the "Job Description" that you put on the scheduling sheet.

At the very top of the sheet is a macro button that you can use each week after you are finished with the schedule for the current week ("week 1"). The macro copies the "week 1" schedule on each of the 5 job sheets to the lower portion of the sheet where it is saved, then moves the "week 2" assignments into the "week 1" columns to make the "week 2" columns available for scheduling. Finally the macro moves the schedule start date up one week.

Employees Sheet

Employee names and initials need to be input on this sheet. You also need to assign each one to a group and assign skills to each person. Since the menus on the 5 job sheets that are used to assign people to jobs depend on the group the employees are assigned, you need to assign each person to a group if you want them available for daily job assignments. The skills assigned to each person appear on the scheduling menus to help you assign the right person to the job. There is also a column for you to input each employee's e-mail address for use in sending schedules to them.

On the right side of the sheet is a table where you can specify up to 10 vacation periods for each person. If someone is on vacation his name will not be available on the scheduling menus and you will not be able to schedule him to a job during his vacation days.

Above the Group and Employee Name columns are macro buttons that you can use if you want to alphabetically sort these columns.

Scheduling Sheets

Five scheduling sheets are provided for you to schedule up to 5 different jobs. Job-related information can be input in the various cells at the top of the sheet. Below the rows for job-related information are the headers for the scheduling columns including a row telling you the number of days since the job started and rows showing the days and dates to be scheduled.

Below the column headers are light green cells where you can assign people to the job each day for 2 weeks. Up to 50 people can be assigned to a job each day by using the drop-down menus provided. The menus depend on the "Group" that you specify and they show only the people in the "Group". The use of the "Skills" column is optional and not required.

The drop down menus show only people who are available on that day and exclude people who are on vacation and people you have already scheduled to a job on that day. The menus show your employee's initials and the skills you have assigned to them on the Employees sheet. The skills are enclosed in brackets [] to separate them from the initials. The scheduling logic will not prevent you from assigning someone with inadequate skills to a job so you need to be careful to select people with the appropriate skill for each assignment.

Above each column, in the header area, are "Copy" macro buttons that will copy the assignments from that column (day) to the next column (next day) to help you to keep the same people on a job for several days. You may also manually copy and paste names from one day to the next if you prefer. If someone is copied to a day when he is on vacation the cell will turn Pink to let you know that he is not available on that day. And, if someone is copied to a day when he has already been assigned to a job the cell will turn Rose-colored to let you know that he is busy on that day. If you input a vacation period for someone after you have assigned them to a job, their job assignments will turn Pink.

Saved results are at the bottom of the page below the active scheduling area. These are saved each time the macro at the top of the Input sheet is run.

At the very top of the sheet you can select a name, skill and/or group to be highlighted. The selected items will be highlighted in Tan-colored cells to help you locate them. To the right of that are two macro buttons that you can use to erase all current and saved to get the sheet ready for a new job.

Emp Schedule Sheet

The table on this sheet shows the job assignments for all employees for one week. You can select the week to display using the drop-down menu at the top of the sheet. A macro is provided that will hide all unused rows and another is available to unhide all rows.

Individual Schedules Sheet

A two week schedule is shown on this sheet for the employee that you select from the menu at the top of the sheet. You can print and distribute the schedules or you can click on the e-mail macro at the top of the sheet and the program will cycle through all of your employees and send a schedule by e-mail if you specified an e-mail address for the employee on the Employees sheet. The e-mail macro copies the individual schedule to the e-Schedule sheet and then sends that sheet to the employee as a one sheet Excel workbook attached to a blank e-mail message.

Job Schedule Sheet

A one week schedule is shown for the job and the week that you select from the drop-down menus at the top of the sheet. The schedule shows the initials of the employees assigned to the job along with the group and skills associated with the employee. If the employee has more than one skill, only the skill required for this job is displayed. Macros are provided to hide unused rows and to unhide all rows. A macro is also provided that will send the job schedule to those you indicated on the Input sheet should receive it. The e-mail macro copies the job schedule to the e-Job Schedule sheet and then sends that sheet to the recipients as a one sheet Excel workbook attached to a blank e-mail message.

Unused People Sheet

The matrix on this sheet shows all employees and days and if someone is scheduled on a particular day, the cell at the intersection of the employee and day will be white. Otherwise it will be dark gray so you can easily spot unassigned people each day.

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.

Technical Support

Technical Support is available by phone, fax or e-mail during normal business hours (Mountain Time).

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