

S13-Nurse Dispatcher Instructions

Location and Shift Assignments for 100 Employees and 10 Locations

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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**n**h**ide, and then select the sheet from the menu.

I. INTRODUCTION

Please Read the License on the License Sheet

This spreadsheet can be used to assign up to 100 employees to up to 10 different locations for a two-week period. Up to 15 employees can be assigned to each shift at each location.

A **Question Mark Icon**  is displayed next to the tables on the various sheets of this spreadsheet. If you click on the icon you will be taken to the appropriate place on the "**Details**" sheet where detailed instructions are provided.

Some cells have attached notes as indicated by a small triangle in the top-right corner of the cell. Place the cursor over the cell and the note will be displayed.

II. LOCATIONS SHEET

A table is provided for the names of 10 locations and the start and stop times for up to 3 shifts. If there are only 2 shifts at a location, you need to put them in the "Shift 1" and the "Shift 3" slots, leaving the "Shift 2" slot blank. On the right side of the table are two columns that will remind you (with an "X") if you do not have a "Shift 1" and a "Shift 3" defined for each location.

The program's overlapping shift assignment checker assumes that if a location has 2 shifts, the first shift will overlap a portion of the first two shifts at a 3-shift location and that the second shift will overlap portions of shifts 2 and 3 at a 3-shift location. Likewise, if a location has 3 shifts, portions of the first 2 shifts will overlap the first shift at a 2-shift location and portions of the last 2 shifts will overlap the second shift at a 2-shift location.

III. EMPLOYEES SHEET

A table is provided for the names for up to 100 employees. You will be alerted by a Rose-colored cell to the left of the name if you enter a name more than once. A message will also be displayed above the "Name" column if you have duplicate names. Three columns are provided for you to indicate (with an "X") if an employee is available for the specified shift. You can select the "X" from the Drop-Down Menu or simply type it in the cell. You can also copy the "X" from another cell. The last 14 columns is where you specify (with an "X") if an employee will not be available on a specific day.

The column on the left labeled "Schedule Links" contains links to the individual schedules. Click on the link and you will be hyperlinked to the "Individual Schedule" for the employee. The 2-week schedule will be highlighted so you can set it to the Print Area if you would like to print the schedule for that employee. You can return to the "Employees" sheet by clicking on the Back Arrow on the left side of the Standard Excel Toolbar.

A macro has been provided that will alphabetically sort the employee names. Click on the macro button at the top of the sheet to activate the sorting macro.

IV. The 10 Location Assignment Sheets.

Twenty location staffing sheets are provided and are labeled L1 through L10. You can change the names of the sheets by right-clicking on the sheet name tab and selecting Rename. If you rename the sheets, only a few tabs will be visible at the bottom of your screen. You can reveal additional tabs by clicking on the small arrows to the left of the tabs, or you can maneuver right and left by pressing Ctrl and PgUp or PgDn on your keyboard.

At the top of each sheet are the names of "Overtime Employees" who have been assigned to more than 40 hours per week. The names are repeated above each of the seven days of the week and on each "Location Assignment" Sheet. Below the "Overtime Employees" is where you make the daily staffing assignments. Three columns are provided for each shift. Employee assignments are made in the first column. The second column is where you can type in the name of the person at the location who booked the shift. The third column is where you can indicate the "Status" (confirmed or cancelled) of each assignment.

Location assignments are made from the Drop-Down Menu located in the shift start time column. If a shift is blank on the "Locations" sheet, it will be Green-colored with a crosshatch pattern. Do not make assignments if the shift is blank. If you do make assignments for a blank shift, the employee will be removed from the list for that shift and any overlapping shifts. Also, the shift times indicated on the "Individual Schedules" Sheet and on the "Group Schedules" sheet will be incorrect. **The copy & paste and the cut & paste Excel commands as well as the Tools, Options Menu have been disabled on the 10 Location Assignment Sheets** to prevent you from moving the drop-down menus from one task to another. Sometimes the copy and paste options are disabled on other workbooks that you open after using this spreadsheet. If this happens (the options menu is unavailable on other workbooks) open and close the enclosed "**Copy Restore.xls**" spreadsheet. Simply opening and closing that spreadsheet will make the options menu available.

Once an employee has been assigned to a shift, (s)he will be removed from the list for that shift and for any shift that overlaps that shift. However, in order to remove the employee from the list, the spreadsheet needs to complete a recalculation cycle. If you make another assignment before the recalculation is complete, it is possible to make duplicate shift assignments for a single employee. If this happens, the employee's name will appear on the row above the location's name and the cell on the left-side of that row will display a Rose-colored "Error". If there are no duplicate assignments, the cell will display a Green-colored "Ok". The name of the employee with the duplicate shift assignment will appear above the column with the offending shift. The name will appear on each "Location Assignment" Sheet where the employee has been assigned a duplicate shift. If more than one employee has been assigned duplicate shifts, they will appear, one at a time, until each duplicate assignment has been addressed.

V. INDIVIDUAL SCHEDULES

The "Individual Schedules" Sheet shows the 2-week schedule for each employee. The "Print Area" has been set to print 100 individual schedules. If you want to print fewer schedules, you will need to adjust the "Print Area".

VI LOCATION SCHEDULE

Select the Location from the Drop-Down menu at the top of the sheet and a schedule will be produced showing who is assigned to that location.

VII GROUP SCHEDULE

This sheet shows all of the shift assignments to all of the locations.

VIII. CAUTIONS

All Data is Input in light green cells or with drop-down menus. Other cells are protected and should not be disturbed.

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.

If cells with input data are hidden, any data contained in those cells will still be used by the spreadsheet.

If you want to change the formatting of any cell (color, column width, etc.) you will need to unprotect the sheet. When you are finished, you should protect the sheet (**T**ools, **P**rotection, **P**rotect Sheet). Be careful that you do not overwrite any formulas in the unprotected cells.

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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