

S14-Task Scheduler instructions

Task Schedules for 20 People and 50 Tasks for 52 Weeks

TABLE OF CONTENTS	
Section Name	Line Number
I. INTRODUCTION	29
II. SETUP SHEET	38
III. AVAILABILITY SHEET	46
IV. SCHEDULING	51
V. STATS	61
VI. INDIVIDUAL SCHEDULES	66
VII. CALENDAR	72
VIII. TASK SCHEDULES	77
IX. vCalendar SHEETS	82
X. IMPORTING THE .vcs FILE INTO MS OUTLOOK	86
XI. CAUTIONS	91
XI. TECHNICAL SUPPORT	99

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.

I. INTRODUCTION

Please Read the License on the License Sheet

This spreadsheet can be used to schedule 20 people to 50 daily tasks for up to 52 weeks. You can schedule up to 5 people per task with a maximum of 3 tasks per person.

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. SETUP SHEET

The "Schedule Date" is input at the top of the sheet and needs to be a Sunday. You will be alerted if the date is not a Sunday.

An "Employee Table" is provided for you to input the names and initials of up to 20 people. The "Target %" column holds the target for total number of tasks (as a percent of the average number of tasks for all people) to be assigned to that person.

The "Task Names and Daily Requirements" Table holds the names of up to 50 daily tasks. You can specify the need for up to 5 people per task. Select the number of people you need for each task each day from the drop-down menu. Alternatively, you can type in a number between 1 and 5 or you can copy a number from one cell to other cells.

A table is provided for you to define the criteria for the conditional formatting of the statistics-containing cells on the Scheduling Sheet. Detailed instructions are provided in the comment associated with the turquoise-colored title box for the table. Hold your cursor over the turquoise-colored box and the comment will be displayed.

III. AVAILABILITY SHEET

The Employee-Task Availability Table is where you indicate if a person is available to be assigned to a specific task. Indicate with an "X" from the drop-down box if a person is available for the task. You can also type the "X" or copy it from another cell.

IV. SCHEDULING

The scheduling sheet is divided into 4 sections. Task assignments are made in the lower right quadrant by selecting a task name from the drop-down menu. Up to 3 tasks can be assigned to each person each day.

The lower left quadrant has the date and day columns as well as two sets of 3 columns where your scheduling progress is monitored. The "Tasks to be Assigned" columns show 3 of the tasks that need to be assigned each day. As the tasks are assigned, they will disappear from the list and be replaced by other tasks. When all of the tasks have been assigned each day, the columns will be empty. The "Extra Assignments" columns will display up to 3 extra tasks that you have scheduled for each day. An "Extra Task" is one not specified as a "regular" task on the Setup Sheet. Or, if you have indicated (on the Setup Sheet) that you need 1 person assigned to a task, and you assign 2 people to that task, the task name will appear in the "Extra Assignments" column.

The top left quadrant has a table where you select, from drop-down menus, the tasks for which you want to gather statistics. Up to 18 tasks can be selected. The "Total Count" column shows the number of times each task has been assigned over the 52 weeks.

The top right quadrant contains the statistics for each of the selected tasks. The "Count" column shows the number of times the person has been assigned to the specified task. The "Rank" column shows the rank of the person assigned to the task. The person assigned the most times will be ranked #1, the one assigned the next most often will be ranked #2, and so on. Two or more people can have the same rank if they are both assigned the same number of times.

Click the Macro button if you would like to erase all assignments on the "Scheduling" Sheet and create a new schedule.

[Click Here to Erase All Assignments on the Scheduling Sheet](#)

V. STATS

This sheet has statistics for all 50 tasks. The table at the top of the sheet has count statistics and the table at the bottom has rank statistics.

VI. INDIVIDUAL SCHEDULES

Schedules are provided for each employee. They are formatted to fit on a single sheet of paper. Each schedule shows task assignments for 16 weeks. There is a box at the top of the sheet where you indicate the start date for the Individual Schedules. The print range is set to print all 20 schedules. If you want to print fewer schedules, you will need to change the print range.

Weekends are highlighted in a dotted pattern. You can add a pattern to the cells associated with holidays and other special days. You will need to unprotect the sheet before adding the new patterns. Be sure to protect the sheet once you are finished.

VII. CALENDAR

The calendar shows task assignments for a two-week period. The calendar start date can be selected from the drop-down menu in the light green box at the top of the sheet. At the bottom of the calendar are 6 rows where you can input notes that you would like to appear on the calendar. The notes can be put in any of the cells on these 6 rows. If the notes are long, be sure to leave the cells to the right of the note free so the note will not be truncated. The print area is set to print the calendar on a single sheet of paper in the landscape orientation.

VIII. TASK SCHEDULES

Task Schedules are created and displayed one task at a time for an eight week time period. Select the start date and the task name from the drop-down menus and the task schedule will be displayed. The print range is set to display the schedule on a single sheet of paper.

Weekends are highlighted in a dotted pattern. You can add a pattern to the cells associated with holidays and other special days. You will need to unprotect the sheet before adding the new patterns. Be sure to protect the sheet once you are finished.

IX. vCalendar SHEETS

The scheduling information can be saved as a file using the vCalendar data format that can be imported into MS Outlook or other software that can read vCalendar files. The file includes a "SUMMARY" field that shows the employee name and a "LOCATION" field that shows his or her Task assignments and a "CATEGORIES" field that displays the word "Shift". A 52 week schedule for a single employee is created on the vCalendar sheet and is saved in the vCalendar file. Select the employee name from the drop-down menu and click the "Create the vCalendar Now" macro button to create the file. The macro will save scheduling spreadsheet under it's current name and then save the vCalendar file in your scheduling directory with the name shown in the cell below the macro button. After the vCalendar file is created, the spreadsheet will close. The hidden vCal Out sheet is used in the creation of the vCalendar files and should not be deleted.

If there is already a file in your scheduling directory with the same name as the vCalendar file being created by the macro, Excel will ask if you want to replace the old file with the new one. If you select "No" the macro will display an error message. Simply select "End" and the macro will stop. Also, after the vCalendar file is saved, Excel will ask you if you want to save the changes in the ??????????.vcs file. You can select either "Yes" or "No" since the old file is the same as the new file.

X. IMPORTING THE .vcs FILE INTO MS OUTLOOK

In MS Outlook select File, Import and Export. Then choose "Import an iCalendar or vCalendar file (.vcs) and browse to your scheduling directory or other folder where you have stored the vCalendar file. Select file type = vCalendar and all of the .vcs files will be displayed. Click on the one you want to import and then click "Ok". The procedure to import a file into a PDA or other device is probably similar, but you may need to check your operating manual.

If you receive an error when importing the .vcs file into MS outlook, it is probably due to miscellaneous punctuation marks in the "SUMMARY" and/or "LOCATION" lines in the .vcs file. When Excel saves a worksheet as a text file, it puts quotation marks (" ") around lines containing certain punctuation marks such as a comma (.). MS Outlook can't import the lines with the quotes and will give you an error message. You can open the .vcs file with Notepad or other text editor and search for the lines containing quotation marks to locate the miscellaneous punctuation marks causing the problem.

The spreadsheet will convert employee names in the format "Last Name", "First Name" into "First Name" "Last Name" (without the comma) format in the .vcs file, so you can use employee names in the Last Name, First Name format. Likewise, if there is a comma in the spreadsheet item that appears in the "LOCATION" line of the .vcs file, the "before the comma" letters will be switched with the "after the comma" letters.

XI. 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.

The Copy & Paste and the Cut & Paste commands as well as the Tools, Options menu have been disabled on the Scheduling sheet to prevent you from moving the drop-down menus from one cell to another.

Sometimes the disabled copy/paste feature affects other spreadsheets. If you experience such a problem simply open and then close the "Copy Restore.xls" spreadsheet that is included in the download package and your copy/paste commands will be restored.

If you find #REF!, #N/A, #VALUE! or other errors in the spreadsheet, they were most likely caused by moving the contents of a cell from one location to another location. If this is the case, you should close the spreadsheet and open an earlier, uncorrupted, copy of the spreadsheet. If you want to save the "corrupted" spreadsheet, save it under another name, so you will not overwrite a previous (good) copy.

It is Ok to sort and move information from one cell to another on the "Setup" Sheet.

XII. TECHNICAL SUPPORT

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

Phone: (208) 855-2502

Facsimile: (208) 855-2503

e-mail: techsupport@shiftschedules.com

Copyright © 1998-2008 Richard A Chapman
All Rights Reserved