S15-Hours & Tasks Instructions

S15-Hours-50 Spreadsheet to Assign Daily Hours and Tasks to 50 People for 4 Weeks

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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**o**rmat, S**h**eet, **H**ide. To unhide a sheet, select F**o**rmat, S**h**eet, Un**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 schedule 50 people, one-week-at-a-time for four weeks by simply specifying the number of hours to be worked in the cell corresponding to the shift start time. Up to 3 daily shifts can be assigned to each person and up to 3 different groups can be scheduled.

Employee vacations and other scheduled absences can be specified and the scheduling logic will keep you from assigning hours to someone while he or she is on vacation.

You specify staffing needs for each group for each hour of the week on the Shift Needs sheet and then assign people to hours (shifts) on the Scheduling sheet. Bar charts above each day show your progress in filling your staffing needs.

All data entry are made in the light green cells. Other cells are protected and may contain formulas and should not be disturbed. When you first open the spreadsheet, you will see that it contains example scheduling activities for illustration. When you are ready to prepare your schedule, delete the contents of the light green cells and the spreadsheet will be ready to use for your schedule.

II. Shift Needs Sheet

Tables are provided on this sheet for you to specify your hourly staffing needs each day of the week for up to 3 different groups of employees. At the top is a small table where you can give names to your groups. This table also shows the supply and demand for people in each group (Avail & Need) as well as staffing surplus and deficit (Over/Under) in both hours and %. The available hours are calculated from the information on the Employees Sheet and the needed hours are based on the staffing needs you input in the tables on this sheet.

III. Employees Sheet

There are two tables on this sheet. The table on the left is where you enter employee names, initials, and FTE status. You also need to assign them to a group and can make short notes about their scheduling preferences. The "FTE Hours" box at the top of the sheet is where you input the number of hours your full time employees work each week. You will be notified by a message above the Name column if you have input duplicate names. And, if you forget to input an employee's initials, the program will use the first 3 letters of the person's name.

The second table is where you can specify up to 10 vacation periods for each employee. If someone is assigned to a vacation, you will be unable to assign hours to that person on the Scheduling Sheet. The program assumes that vacation days are from midnight to midnight and that someone can be assigned hours as soon as he or she returns from vacation. And, if someone is assigned hours before the vacation period, only the hours before the vacation day will be counted in the schedule.

Two sort macros are provided; one to sort by group and employee name and the other to sort by employee name. Sort this table only before you start your scheduling for it will alter the employee name order and assignments on the Team Schedule Sheet and provide incorrect schedules if it is done in the middle of your scheduling. If you want to add an employee name, add it to the bottom of the list and then sort the names if you would like them in alphabetical order. If you would like to delete one or more employee names and then sort the list to remove the blanks, you first need to click the **macro button to "<u>Prepare to Delete Name</u>"**. If you forget to run this macro, the assignments will not be properly aligned with the employee names on the Scheduling Sheet. You don't need to run the "Prepare to Delete Name" macro if you remove a name and replace it with a new employee name in the deleted name's slot. If you do this, the old employee's assignments on the Scheduling sheet will be assigned to the new employee.

IV. Scheduling Sheet

The Scheduling Sheet is divided into 4 sections. We will begin with the **<u>lower right section</u>** where you assign hours to your people each day for a week in the light-green cells. The days and hours of the day are shown above the light green cells. People are assigned by inserting a number into the cell corresponding to the first hour the person is scheduled to work. For example if someone is to be assigned to work an 8 hour shift beginning at 11:00 AM on Saturday, you need to put an "8" in the column labeled "11" on Saturday. The cell under the first hour of the shift will turn light gray and the remaining hours in the shift will turn dark gray. If someone is on vacation, the cells for the vacation days will be color coded with an Indigo color and any assignments that you make in these cells will be ignored by the program.

You can assign each person up to 3 shifts a day. If you assign someone to more than 3 shifts a day, the hours will be counted, but the various schedules created by the spreadsheet will show only the first 3 shifts. You will be alerted to this situation by a pink color-coding in the "Got" column for the person with more than 3 shifts per day.

To the left of "Day 1" are hidden columns containing "Day 0" which is the last day of the prior week. Color coding to indicate overnight shift assignments from "Day 0" are shown in the "Day 1" columns as required to show the "Day 1" staffing coming from someone assigned to a "Day" 0 shift.

<u>The top right section</u> shows the number of people that you need each hour, the number that you have assigned (got) and the number remaining to be assigned. The chart above the numbers show the scheduling results graphically for each hour of the week. The light orange portion of the bar shows the people still needed and the turquoise portion shows the number of people already scheduled (got). All of your staffing needs have been filled when all of the light orange bars have turned to turquoise. The "Got" row of numbers are color coded to indicate your scheduling progress. If the cell is rose-colored, you still need to assign people to work that hour. If the cell is tan, you have assigned too many people to that hour and if the cell is turquoise, you have scheduled the proper number of people. Also, note that the total number of people still needed is shown in a box at the far-left side of the "To Go" row.

<u>The bottom left portion</u> of this sheet shows your employee names and groups as well as scheduling preferences and availability. The "Days Off" columns have either white or gray bars to indicate which days each person has some hours assigned (gray) or has no hours assigned (white). Also shown is each person's target number of hours (Need) and the number of hours assigned (Got) as well as the number of hours remaining to be assigned (To Go) before "Need" matches "Got". Employees are listed by group with the groups in the order that you input them on the Shift Needs Sheet.

<u>The top left portion</u> of the sheet is where the schedule start date is input and is where the scheduling macros are found. Also found in this section are 3 check boxes for you to use to specify which groups will be shown in the scheduling statistics and the bar charts. Click on the box and put a check mark in it if you want the group's statistics to be included in the displays. You can check some or all of the boxes. If you want to schedule one group at a time, check just that group's box and the scheduling statistics will show only people from that group. All of the initial shift indicators (the numbers you input to show the shift start time and duration) will be displayed in the light gray boxes, but the dark gray bars showing each person's shifts will be shown only for the group(s) checked.

<u>The Scheduling Macros</u> are used to save your results after you have created a one week schedule. After you have finished the first week's schedule, click the "Save Week 1 Results" and the results will be saved on the Team Schedule Sheet. The 4 macros will also copy your "Day 7" shift assignments to the hidden "Day 0" to preserve continuity from one week to the next. In addition, the 4 macros will add 7 to the "Schedule Start Date" so you will be ready for next week's schedule. There is also a macro that you can use to erase all of the scheduling results so you can start with a clean slate for next week's scheduling. Or, you may want to preserve last week's assignments and make minor changes as required for this week.

<u>If you want to go back and reschedule a week</u>, simply click the macro button to recall that week's saved schedule. You can proceed to make changes and then save it when you are finished.

A small table to the right of the macro buttons shows the weeks on the Team Schedule that contain saved scheduling data. A macro is provided both on this sheet and on the Team Schedule sheet that can be used to delete the weeks saved on the Team Schedule sheet if you are starting a new 4 week schedule.

After you have created schedule for all 4 weeks, save the spreadsheet under an appropriate name (such as Schedule 10-2-05 to 10-29-05) before printing out the various schedules. The next time you want to create another schedule, open the previous one (with the next "Schedule Start Date" already updated and the proper "Day 0" shift assignments in place) and make your assignments.

V. Tasks Sheet

You can assign up to 10 different tasks to each employee by selecting the task name from the drop-down menu of task names. The columns on the left side of the sheet show all employee hour (shift) assignments and you can assign tasks to anyone who has a shift (hours) assignment.

The columns have data filters that allow you to display only the information that you need to see. Without the filters, the sheet will show 84 rows per employee (3 daily shifts times 28 days per 4 weeks). You can filter the data on as many columns as you would like. For example you can set the filters to show a single date and a single employee.

If you would like to print a shift and task schedule for a single employee, you can set the data filters to show only the desired employee and then print the schedule.

VI. Hours Sheet

The table on this sheet shows the number of hours you have assigned to each person each week. Also included on the table is the target FTE for each person and the actual FTE based on the hours scheduled. The hours and FTE are color-coded to show hours in excess of the target FTE in tan and hours less than the target FTE in turquoise.

VII. Team Schedule

Scheduling results are saved to the Team Schedule sheet and from there the results are used to create the other schedules and calendars. When you click one of the "Save xxx Results" macros on the Scheduling sheet, the results are saved to this sheet.

VIII. Individual Schedules

Schedules for each employee are shown on this sheet. The print range is set for all of the schedules and is setup to print one schedule per sheet of paper. You may want to change the print range to include only the number of people you are scheduling.

IX. Task Summary Sheet

The table on this sheet shows all task assignments and can be filtered to display only the desired employees, tasks or times.

X. Calendar

The calendar displays bar charts showing who is scheduled to work each hour of the day. Each of the 28 daily calendars can be printed and posted for reference.

XI. 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's name and a #1, #2 or #3 to let you know if it is the first, second or third daily shift assigned to that person. A 7 day schedule for all employees is created on the vCalendar sheet and is saved in the vCalendar file. Select the start date for the file from the drop-down menu and click the "Create Weekly vCalendar File" 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.

A 28 day schedule for a single employee is created on the vCalendar-2 sheet. Select the employee name from the drop-down menu and click on the macro button to create the single employee schedule.

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.

XII. 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.

XIII. Password Protected Sheets

'All of the sheets have protected cells (cells that you may not use to input data). All of the unprotected cells for use in storing data are light green in color. Each worksheet is protected to prevent you from overwriting the information in the protected cells. We advise that you leave the worksheets protected unless you want to make changes on a worksheet that can not be made if the sheet is protected. For example, if you want to hide or unhide rows and columns or change cell colors you will need to unprotect the sheet (Tools, Protection, Unprotect Sheet). Be sure that you do not change the contents of the protected (non-light green) cells. You can, however, change the color, formatting, etc of the protected cells. After you have made the changes, be sure to protect the sheet (Tools, Protection, Protect Sheet). No password has been assigned to the sheet protection. You may wish to add a password (part of the Tools, Protection, Protect Sheet series).

XIV. 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.

Also, do not move cells from one location to another for it may corrupt the spreadsheet. You may be able to get away with moving (cut and paste) some cells, but if you do it with other cells, it can affect the spreadsheet logic.

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

XV. Technical Support

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

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