

S16-Tasks Instructions

Task Calendar for 50 Employees

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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.

I. INTRODUCTION

Please Read the License on the License Sheet

This spreadsheet can be used to assign 50 people to one of 25 groups and to up to 10 of 75 tasks each day for a month. The scheduling sheet is in the form of a calendar. Each day on the calendar you specify the, group and task needs and then you assign people to meet these needs.

Schedule output is on two calendar sheets; one showing the assignments for the selected employee and the other showing the assignments to the selected task.

All of the cells on all of the sheets are protected. (Except the drop-down menus on the Task Calendar and the Employee Calendar.) You will need to unprotect a sheet (**T**ools, **P**rotection, **U**nprotect Sheet) in order to make any changes on the sheet or to run any of the macros on the sheet. If you protect the sheet (**T**ools, **P**rotection, **P**rotect Sheet) with a password, the password will need to be used to unprotect it. A password needs to be input each time you protect or unprotect a sheet.

Some cells have a comment associated with them as indicated by a small red triangle in the lower right corner of the cell. If you hold the cursor over the cell, the comment will appear.

II. INPUT SHEET

The "**Schedule Start Date**" is input in the light-green cell at the top of the sheet. The start date needs to be the first day of the month, and if you input something else, the program will change the date to the first day of the month. The date can be input in any date format such as 3/1/06, but is displayed as month, day, year.

This sheet has two tables where you can list your "Groups" and "Tasks". These are the items that you can use on the "Scheduling" sheet to define your daily needs. There are "Sort" buttons above the two tables. Click the button if you wish to alphabetically sort the table.

You do not need to list groups or assign them to people on the Employee sheet if you don't need this feature. The "Group" names should be short (3 to 4 characters max) because they will be combined with your employee names on the Scheduling sheet.

III. EMPLOYEES SHEET

The "Employee Table" is where you input your employee names and e-mail addresses and assign them to one of the "groups". The "group" column can be left blank if you don't want to assign someone to a group. The "group" can be assigned from the drop-down menu, typed in the cell, or copied from one cell to another. If you assign someone to a group, the employee name will be preceded by the group name in the drop-down menus on the scheduling sheet.

Up to ten vacation periods can be input in the "Employee Vacation Table" for each employee. If someone is shown to be on vacation in this table, they will be unavailable in the drop-down menus for task assignments on the Scheduling sheet.

"Sort" macro buttons are provided above 2 of the columns in the "Employee Availability Table". If you want to alphabetically sort this table, you should use the macros to be sure that the correct columns are included in the sort.

IV. SCHEDULING SHEET

The Scheduling sheet is in the form of a calendar with each day divided into 3 columns where you specify the "Task" and "Group" needed each day and then assign someone to fill that need. Each day has 40 rows where you can define and fill up to 40 assignments using the drop-down menus in each cell. The daily employee assignments are made in the "Person" column and the drop-down menu is unique for each day and shift because the menus contain only the names of people who are available on that day.

The "Person" column drop-down menus include both the person's name and the group that person has been assigned to. When scheduling, you do not need to specify a "Group" but you do need to specify a "Task".

To the left of the scheduling calendar are several "Hide" and "Unhide" macro buttons. The "Unhide" macros will reveal all 40 scheduling rows for the week. If you don't need that many rows for your scheduling, you can hide the extra rows by clicking on one of the "Hide" buttons. When you click one of these "Hide" buttons, all scheduling rows in the block next to the "Hide" button will be hidden from view. If you have made assignments on the hidden rows, they will still be counted and will appear on the two output calendars.

You can assign someone to as many tasks as you want each day but only ten task assignments are shown for each person on the Employee Calendar sheet. If someone has more than one assignment per day, all of the assignments for that person for that day will be highlighted in bright green colored cells to make you aware of the multiple daily assignments.

At the top of the Scheduling sheet is a box where you can select an employee to be highlighted. When you select someone from the drop-down menu, all occurrences of that person's name on the calendar will be highlighted in tan-colored cells. This will help you see at a glance the assignments for the selected person.

Also at the top of the Scheduling sheet is a macro button that you can click to erase all of the specified daily needs and assignments for the whole month in preparation for scheduling another month.

If the columns on the scheduling calendar are too narrow or too wide, you can adjust them by placing your cursor in the column and selecting Format, Column, Width on the Standard Excel Toolbar and then typing a number in the box provided.

Another option to allow more information in a cell is to format the cell to allow the text to wrap around to another row. This will automatically adjust the row height so all of the text will be displayed in the cell. If you would like to do this, select all of the cells you want to format in this manner and select Format, Cells, Wrap text from the Standard Excel Toolbar. You can also adjust the font size to allow more information to be displayed. You can do this by selecting Format, Cells, Font from the Standard Excel Toolbar and then selecting the font properties you want to apply to the cell.

V. TASK CALENDAR

Daily assignments for a single task are displayed on the Task Calendar. Select the task you want to display from the drop down menu at the top of the sheet and the calendar will display up to 10 people assigned to that task.

The print range is set to display all 6 calendar weeks. You may want to adjust the print range if you need to display only 4 or 5 weeks. The print footer (at the bottom of the sheet) is set to display the date that the calendar was printed. This feature is useful if you need to print the calendar more than once per month to reflect new and changed assignments.

If you would like to adjust the calendar columns or other properties to allow more information to be displayed, you can use the same techniques discussed in the Scheduling Sheet section.

VI. EMPLOYEE CALENDAR

All of the daily assignments for the month are shown on this calendar for a single employee who is selected from the drop-down menu at the top of the sheet. Up to 10 daily task assignments can be displayed for each employee.

These calendars can be printed and distributed to your employees so they will know their assignments for the month. The print range is set to display all 6 calendar weeks. You may want to adjust the print range if you need to display only 4 or 5 weeks. The print footer (at the bottom of the sheet) is set to display the date that the calendar was printed. This feature is useful if you need to print the calendar more than once per month to reflect new and changed assignments.

If you would like to adjust the calendar columns or other properties to allow more information to be displayed, you can use the same techniques discussed in the Scheduling Sheet section.

VII. E-MAIL AND E CALENDARS

The Employee Calendar sheet can be sent by e-mail to selected employees. Input the e-mail address of your employees on the Employees sheet and select the recipients on the E-Mail sheet and then click on the "send" button on the Employee Calendar sheet. Be sure to select employees to receive the calendar by clicking on the individual check boxes, or you can choose the "Send to Everyone" option.

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 each message. This is okay for a few messages, but if you are sending schedules to all of your people, this can become bothersome and time-consuming. You can change the security settings for your e-mail client to allow a program to send e-mail messages without asking your permission. The down-side of changing the security settings is that some not-so-friendly program can flood the world with spam from your computer. You need to decide if the reward is worth the risk. Instructions on how to adjust the Windows security settings for Outlook Express, Outlook and Windows Mail can be found at:

<http://www.rondebruin.nl/mail/prevent.htm>

The ECalendar sheet contains the scheduling information on the Employee Calendar sheet and will be sent to your recipients as a single sheet Excel workbook. If any of your recipients do not have the Excel software, 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>

VIII. CAUTIONS

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.

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 (the light green cells), any data contained in those cells will still be used by the spreadsheet.

IX. TECHNICAL SUPPORT

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

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