

S16-Shifts Instructions

Calendar Dispatcher for 6 Shifts and 50 Employees

TABLE OF CONTENTS	
Section Name	Line Number Click to go there
I INTRODUCTION	24
II INPUT SHEET	34
III EMPLOYEES SHEET	41
IV SCHEDULING SHEET	48
V LOCATION CALENDAR	60
VI EMPLOYEE CALENDAR	67
VII. E-MAIL AND E CALENDARS	70
VIII CAUTIONS	75
IX TECHNICAL SUPPORT	80

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 up to 50 people to one of 25 groups and one of 6 shifts at one of 75 locations each day for a month. The scheduling sheet is in the form of a calendar. Each day on the calendar you specify your location, group and shift 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 for the selected location.

All of the cells on all of the sheets are protected. (Except the drop-down menus on the Location 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 three tables where you can list your "Shifts", "Groups" and "Locations". These are the items that you can use on the "Scheduling" sheet to define your daily needs. There is a column for you to put an abbreviation (or code) for the location, and a column for you to input the full location name. The abbreviation will appear on the Scheduling sheet drop-down menus and the full location name will appear on the Location Calendar. If you leave the full location name blank, the location abbreviation will appear on the Location Calendar. There is a "Sort" button above the "Locations" table. Click the button if you wish to alphabetically sort the location abbreviations along with the full location names and e-mail addresses for the locations.

The "Group" names should be short (3 to 4 characters max) because they will be combined with your employee names on the Scheduling sheet. The "Shift" names can be 1,2,3 or a start time such as 7,3 or 11 or anything else you want to call them. They should also be rather short in order to fit in the space provided on the Scheduling sheet.

III. EMPLOYEES SHEET

Employee names and e-mail addresses are input on this sheet. Each employee may then be assigned to a group using the drop-down menu. 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.

Employee availability can be specified in great detail by placing an "X" in the appropriate day and shift columns of the Employee Availability Table. You can type the "X" in the cell, select it from the drop-down menu, or copy it from one cell to another. If you do not need to specify availability in such great detail, you can simply put an "X" in the "Available All Days & Shifts" column. An "X" in this column overrides any blanks in the detailed availability columns. There is a macro button that you can click to hide all of the detailed availability columns.

To the right of the Employee Available Table is the Employee Vacation Table where you can specify up to 10 vacation periods for each employee. This table can also be used to specify other absences. If someone is on "Vacation" they will not be available for any shift assignments on the days they are gone.

"Sort" macro buttons are provided above Employee and Group columns. If you want to alphabetically sort your employee names or groups and the associated availability and vacations, you should use the macros to be sure that the correct columns are included in the sort.

There is also a "Delete All Availability Data" macro button above the "Employee Availability Table" and a "Delete All Employee Vacations" macro button above the "Employee Vacations Table". Click these buttons if you want to erase all of the "X"s in preparation for inputting new data.

IV. SCHEDULING SHEET

The Scheduling sheet is in the form of a calendar with each day divided into 4 columns where you specify the "Location", "Shift" 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 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 for the specified shift 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" or a "Location" but you do need to specify a "Shift" in order to activate the drop-down menu in the "Person" column. The spreadsheet also needs to complete a recalculation cycle in order to populate the drop-down menu in the "Person" column.

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 for the week that are in the block next-to and below 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 locations and shifts as you want each day. 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. LOCATION CALENDAR

Daily assignments for a single location are displayed on the Location Calendar. Select the location you want to display from the drop down menu at the top of the sheet and then click on the "Setup Calendar" button at the top of the sheet and unused rows will be hidden in blocks of 5 rows each.

These calendars can be printed and sent to the various locations so they will know who is assigned to each daily shift. 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.

The calendars can also be sent as an e-mail attachment to selected locations. Please see Section VII for details.

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 3 daily 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.

The calendars can also be sent as an e-mail attachment to selected locations. Please see Section VII for details.

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 Location Calendar sheet and the Employee Calendar sheet can be sent by e-mail to selected locations and employees who have been assigned e-mail addresses on the Input and Employees sheets. Select recipients on the E-Mail sheet and then click on the "send" button on the Location Calendar sheet and/or the Employee Calendar sheet.

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 sheets contain the scheduling information on the Calendar sheets 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

Phone: (208) 855-2502

Facsimile: (208) 855-2503

e-mail: techsupport@shiftschedules.com