

S17-Limited Availability Instructions

Staff Scheduler for 25 Employees, 25 Shifts and 25 Categories

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I. Introduction

This spreadsheet can be used to schedule 25 employees in 25 different categories to 25 shifts, tasks or locations each day for a week. Employee availability can be specified in up to 6 different time periods each day to accommodate employees with very limited availability. Scheduling is done in pre-defined increments throughout the day from drop-down menus of available employees and once someone is assigned to a time slot, his or her name will be removed from the menu for that time slot for the rest of the day.

Several comments have been placed in column-header cells as indicated by a **small red triangle** in the top right corner of the cell. Hold your cursor over the cell to expose the comment and learn more about the spreadsheet features.

II. Shifts Sheet

Up to 25 shifts/tasks/locations can be defined on this sheet where each one has a start and stop time as well as the category of employee required to fill it. You also need to specify which days of the week the shift/task/location needs to be filled. Since the Scheduling sheet allows scheduling in pre-defined increments, your shifts should be in multiples of that increment. Allowed increment start and stop times are listed at the top of the Scheduling sheet.

At the top of the sheet is a place where you can specify the time increment for your schedule. If you leave this blank, a default 30 minute increment will be used. Also at the top of the sheet is a place where you can choose to have the first shift of the day start at midnight or to start at the time of the earliest shift that you list in the shift table. If you select "No" so the times on the Scheduling sheet start at the time of your earliest shift, you will need to re-do all of your scheduling if you decide to add an earlier shift or delete the earliest shift. The advantage of selecting "No" is that you will be able to schedule shifts that go past midnight. If you select "Yes" you can still schedule shifts that go past midnight, but they will need to be scheduled on two different days.

There is also a table where you can specify up to 25 different employee categories for use in specifying employee qualifications and defining shifts/tasks/locations.

III. Employees Sheet

This sheet contains a very large table where employees are listed and their e-mail address, qualifications and daily availability are specified. To the left of the employee name is a column where you can specify the employees hourly pay rate that will be used in the budget calculations on the "Hours" sheet. To the right of the employees name are 10 columns where you can specify the employee's qualifications by selecting them from a drop-down menu. You may also copy and paste qualifications from one cell to another.

Further to the right is the place where you can specify up to 6 daily time slots in which the employee will be available for assignment to work shifts.

Any columns that you do not need can be hidden (Format, Column, Hide) from view. Do not delete the unnecessary columns for that will corrupt the spreadsheet.

IV. Scheduling Sheet

STUFF AT THE TOP OF THE SHEET

The "Schedule Start Date" is input at the top left corner of this sheet.

Scheduling is done one day at a time in any order you want. Select the active "Schedule Day" from the menu to the right of the "Schedule Start Date". The active scheduling day is indicated by the word "Active" and blue-colored cells under the days of the week to the right of the menu where the schedule day is selected.

Three macro buttons are provided for each day of the week. After you have finished scheduling a day, you can click on the "Save" button in the blue-colored "active" column to save the results for that day. If you would like to modify the schedule for that day, you can click the "Recall" button to have the previously saved results placed in the "active" scheduling columns where you can do additional scheduling. The "Delete" macro buttons can be used to delete any of the "saved" scheduling results. The "Save" and "Recall" macros will only work if the day column is "active" and highlighted in blue.

The "Save" macro will not work unless the "Save" row label is blue-colored. Other colors indicate some sort of scheduling error that must be corrected before the results can be saved. Hold your cursor over the cell to reveal a comment that explains the error. The time-slot headers above the scheduling cells are also color-coded to help you find the errors.

Scheduling errors can arise when you do not start with a clean slate for the day. You can clear all "active" day assignments by clicking the "Clear Active Assignments" macro button below the "Schedule Start Date" cell. Four types of scheduling errors are as follows:

Errors of Omission: If all of the light-green scheduling slots are not filled with employee names, some of the column headers and the word "Save" will be highlighted in a **Pink-colored cell**. You will need to fill all of the slots before the results can be saved.

Extra Assignment Errors: You can recall any saved scheduling results and then apply them to the "active" schedule day. Or you can simply leave one day's assignment in the "active" scheduling cells and then select another day to be the "active" schedule day. Since shift staffing requirements can change from day-to-day, there may be some extra assignments left in the dark-colored scheduling cells (where nobody is required). If this happens, some column headers and the word "Save" will turn **Rose-colored**. You will need to locate the extra assignments and delete them before you can save the results.

Employee Availability Errors: You can recall any saved scheduling results and then apply them to the "active" schedule day. Or you can simply leave one day's assignment in the "active" scheduling cells and then select another day to be the "active" schedule day. Since employee availability can vary from day-to-day, someone may be assigned to a shift for which he or she is not available. If this happens, some column headers and the word "Save" will turn **Tan-colored**. You will need to locate and correct the incorrect assignments before you can save the results.

Errors of Impatience: The spreadsheet must have time to recalculate after each assignment to assure that the drop-down menus have been updated. If the recalculation has not completed, it is possible to assign someone to more than one shift in a particular time-slot. **This type of error will not be detected by the spreadsheet logic.** Since all shift assignments are shown on the "Schedule" sheet, you (or the miss-assigned) employee may eventually spot the error. If you make all of the shift assignments for a single shift by working across a row, you don't need to worry about the recalculation until you go to another row to schedule another shift.

When a day's schedule has been saved, the day abbreviation in the top row will turn from Rose to Aqua to let you know that any results saved for that day is in the current week, and not something left over from last week.

STUFF AT THE BOTTOM OF THE SHEET

Shift requirements are listed on the left side of the screen. The category assigned to the shift on the "Shifts" sheet has been supplemented with a code number between 1 and 25. The code number also appears on the drop-down menus used for scheduling to indicate each person's qualifications. The shift name and the start and stop times are also shown in this area of the spreadsheet.

Fourty eight time slots are provided where you can assign your employees to various shifts from drop-down menus of available employees. The cell is colored light green if a shift is required and dark gray if one is not needed. Assignments are made from drop-down menus of available employees. Initially the menu is full of people who are specified as available for that time-slot. As people are assigned within a time-slot, their names are removed from the menu, preventing you from assigning anyone to overlapping shifts.

Each drop-down menu includes a **fictional employee "X"** who can be assigned as many times as required if there is nobody else available to assign to the shift. After you are finished scheduling, you can go to the "Schedule" sheet and select "X" to be displayed in the Employee column to locate all shift vacancies.

Each employee name is followed by up to 10 numbers between 1 and 25 indicating the categories for which he or she is qualified. You need to be sure to assign someone with the proper qualifications to each shift.

After all of the required shift assignments have been made the column headers and the word "Save" next to the macros row will turn blue and the scheduling results can be saved.

STUFF ON THE WAY BOTTOM OF THE SHEET

Scheduling results are saved in the rows below the "active" scheduling area for use in preparing the assignments shown on the "Schedule" sheet. The saved scheduling assignments can be viewed, but not changed unless they are brought back into the "active" scheduling area by use of one of the "Recall" macros. The "Recall" macro will only work in the blue-colored column, so you need to select the "active" scheduling day before recalling the saved results.

V. Emp Chart Sheet

The chart shows scheduled hours for the selected employee in graphical form for the week. Select the employee name from the drop-down menu.

VI. Schedule Sheet

All of the "Saved" scheduling results are listed on this sheet. There are 8,400 rows for data with one row for each of the 25 shifts and 48 daily time-slots and 7 days. The data on this sheet can be filtered to display only the desired information. Directions are provided at the top of the sheet. Individual schedules and shift schedules can be printed after selecting the proper data filter(s).

VII. E-Mail & E-Schedule Sheet

Select the employees you would like to send a schedule via e-mail and then click the macro button at the top of the sheet to send the schedules. You can specify individual employees or you can check the "Send to All" box.

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 E-Schedule sheet contains the scheduling information from the Emp Chart 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. Hours Sheet

The number of hours scheduled for each employee for the "active" schedule day are shown on the left side of the sheet. Hours are saved on this sheet each time a "Save" macro is run on the Scheduling Sheet. Also, the daily hours are deleted on this sheet each time a "Delete" macro is run on the Scheduling sheet.

On the right is the total hours for the week for each employee and a total for all employees is shown at the top of the column. In addition, the payroll budget is shown for each person based on their hourly rate that you input on the Employees sheet. Overtime is calculated for hours in excess of 8 per day and 40 per week using the overtime multiplier that you have specified at the top of the sheet.

IX. 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.

X. Technical Support

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

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