

# S18-Day Process Scheduler Instructions

## Daily Task Scheduler for 5 People or Processes

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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**

This spreadsheet can be used to schedule a person or a process (piece of equipment) to successive jobs or tasks each day for up to 6 months. You simply list the tasks and the duration (in days) of each task along with the date the first task is to begin, and the spreadsheet will keep track of the progress of each task and will display when the task is scheduled to begin and be finished. This spreadsheet can accommodate up to 5 different people or processes and up to 20 tasks can be assigned to each. The order in which the tasks are to be performed can be changed at any time if your priorities change.

The scheduler can be used for continuous 24/7 operations or it can be set to exclude holidays or weekends (or whatever) days from the job countdown.

Some cells have a small red triangle in the top right corner to indicate there is a comment associated with the cell. Hold your cursor over the cell and the comment will appear.

## **II. Input Sheet**

A work day table and a holiday table are provided. The work day table allows you to indicate what days of the week your people/processes work during the week. And the holiday table provides a place to list up to 20 days that your people/processes do not work.

## **III. People/Process (Op1-Op5) Sheets**

Each of the 5 people/process sheets contain a table where your tasks are specified. The name of the person or process being scheduled goes in the light green cell at the top of the table and up to 20 consecutive job/tasks can be listed in the table. Each task needs to have a name, the order in which it is to be performed, and a duration. Any of these items can be changed at any time so if you find that the current job will take more or less time than planned, you can change the job duration.

The job/task duration does not need to be a whole number, but can contain a fraction of a day. The start and stop times show only whole days, but fractional days are tracked and reflected in the start and stop dates shown. If only whole days are specified, the job/task is assumed to start at the beginning of the day and end at the end of the day and the finish date for a 1 day task will be the same as the start date.

If you want to rearrange the order in which the tasks are to be performed, you simply change the numbers in the "Order" column. The numbers in the "order" column can be fractions so if you want to insert a task or job between jobs #3 and #4, assign an "order" of 3.5 or other number between 3 and 4 to the job. When the "Update List" macro button at the top of the sheet is clicked, the "order" numbers are converted to whole numbers and the tasks are sorted to put them in the proper order. The "Update List" macro also removes tasks that have been completed.

If a person is scheduled to be on vacation, or if a piece of equipment is unavailable for some reason, that event can be represented as a job/task. If the vacation is scheduled in the middle of a job, the job can be split into two smaller jobs to accommodate the requested vacation time.

If you enter a job/task name more than once (on any of the sheets) it will be highlighted in a rose-colored cell to let you know that one of the job/task names needs to be changed to remove the duplication. Also, if you enter the same job order more than once the cells will change to a rose color to let you know that the spreadsheet can not deal with this situation and is confused. You will need to remove the duplicate entry.

## **IV. All Jobs Sheet**

This sheet lists all of the task/jobs on all of the people/process sheets along with the duration, person/process (Op) name and start and stop dates and times. The numerous rows of information can be filtered to display only the entries you want to see. Each column has a small down arrow that you can click and select the information you would like to be displayed. The filters hide the unwanted rows so just the requested records are displayed. For example if you want to see all of the jobs assigned to a specific person, select that person from the menu. The drop-down menus list the items in alphabetical order so tasks and people are easy to find.

After you are through viewing the filtered data, you should select "all" from the drop-down menu to display all of the data in that column. The little down arrow will be blue if a filter has been selected and black if a filter has not been selected for the column. The sheet needs to remain unprotected if the data filters are to be available.

## **V. Job Queue Sheet**

All of the jobs are shown on this sheet along with their position in the job queue. Calendar days and hours are listed along the left side of the table with "today" at the top of the list. The jobs or tasks for each person/process are shown in the various columns on the sheet.

The cells are color-coded to highlight when one job/task stops and the next one begins. Also note that days when the people/processes are not working are blacked out to indicate that they are not counted in the task duration.

The numerous rows of information can be filtered to display only the entries you want to see. Each column has a small down arrow that you can click and select the information you would like to be displayed. The filters hide the unwanted rows so just the requested records are displayed. For example if you want to see all of the jobs assigned to a specific person, select that person from the menu. The drop-down menus list the items in alphabetical order so tasks and people are easy to find.

After you are through viewing the filtered data, you should select "all" from the drop-down menu to display all of the data in that column. The little down arrow will be blue if a filter has been selected and black if a filter has not been selected for the column. The sheet needs to remain unprotected if the data filters are to be available.

## **VI. 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.

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

## **VII. Technical Support**

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

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