

S19-Bus Scheduler Instructions

Bus-50 for 50 Employees, 50 Buses and 100 Shifts or Routes

Section Name	Line Number Click to go there
I. INTRODUCTION	32
II. SETUP SHEET	40
III. SHIFTS SHEET	48
IV. EMPLOYEES SHEET	56
V. VACATIONS SHEET	63
VI. SCHEDULING SHEET	64
VII. CALENDAR SHEET	70
VIII. GROUP SCHEDULE SHEET	87
IX. E-MAIL & E-SCHEDULE SHEET	92
X. LOCATION SCHEDULE SHEET	99
XI. WEEKLY SHIFTS AND SHIFT REPORT SHEETS	104
XII. CAUTIONS	108
XIII. TECHNICAL SUPPORT	115

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 schedule 50 people in 50 categories to shifts or Routes and buses for up to one month. A category may be a job title (Driver, Manager, etc.), a department (Maintenance, etc.) or any other parameter that you need to schedule.

Several cells have comments as indicated by the red triangle located in the top right corner of the cell. Hold the cursor over the cell and the comment will be displayed.

After you read the License, and input your password on the Welcome sheet, you may want to hide these sheets, along with the Order Sheet to make more of the sheet tabs visible at the bottom of the screen. To hide a sheet, simply go to that sheet and select **F**ormat, **S**heet, **H**ide. To unhide a sheet select **F**ormat, **S**heet, **U**nhide, and then select the sheet you want to view.

II. SETUP SHEET

The first day of the schedule is input at the top of the "Setup" Sheet. Below that is a table where you specify the name for each employee category and the maximum number of employee shifts to be associated with that category on the "Shifts" sheet. It is a good idea to provide room for a few more shifts than necessary in order to permit you to add shifts in the future. For example, if you need 10 shifts in the first category, you can enter 15 in the first column of the table in order to provide space for a few additional shifts if you should need them later. **The total number of shifts is limited to 100**, so if the total of the table's first column exceeds 100, a message will appear at the top of the table to alert you to reduce the total number of shifts.

The category "Off" is required and at least one shift is required in this category. Anyone assigned to that category will not be shown on the Group Schedule for days they are assigned to a shift in the "Off" category. The "Off" category can be used for regular unpaid days off, paid vacations, paid training, or any other activity you want to define. Be sure to allow sufficient "Shifts" in this category. For example if you sometimes have as many as 3 people on vacation at a time, plus 2 people in training plus 5 people on their regular unpaid days off, you need to specify at least 10 shifts in this category and it may be a good idea to specify 12 or so to provide room for extras. You don't need to actively assign days off on the Scheduling sheet, but can instead simply leave the cell blank to indicate there is no shift assignment on that day. The "Off" assignments are provided as an option for those who prefer to actively assign days off to their employees.

You can use the same category name more than once if you want. For example, if you have a category called "Manager" and you specified that you needed 10 shifts in the category. Later you may find that you need another 5 shifts for the "Manager" category. You can add another category called "Manager" at the bottom of the list and then you can define additional "Manager" shifts on the "Shifts" Sheet. In another case, you may have specified that you need 15 shifts in the "Manager" category, but only defined 10 Manager shifts on the Shifts Sheet. Now, if you go to the Shifts Sheet and define additional Manager shifts, the category and shift information on the Scheduling Sheet will move down to make room for the additional Manager shifts that you just defined. But, since the employee assignments do not also shift down to make room for new assignments, the assignments below the original 10 Manager slots will be incorrect. You can avoid this situation by simply adding a second "Manager" category on the Setup Sheet. Your new Manager shifts will appear at the bottom of the Scheduling Sheet. Another approach to avoiding t

The table on the right side of the sheet can hold up to 300 bus numbers for use in assigning busses to people on the Scheduling sheet. The program will add an "A" and a "P" (for AM and PM) to the bus number in the drop-down bus assignment menu on the Scheduling sheet.

III. SHIFTS SHEET

Each category that you defined on the "Setup" Sheet is shown on the "Shifts" Sheet where you specify the start and stop time for shifts associated for the category and indicate which days of the week the shift needs to be filled. One shift needs to be defined per employee. For example if you need 2 managers from 8:00 AM to 5:00 PM, you need to enter the 8 to 5 shift two times under the "manager" category. Likewise, if you need a manager from 8:00 AM to 5:00 PM and another manager from 10:00 AM to 3:00 PM you need to specify both the 8 to 5 shift and the 10 to 3 shift under the "manager" category. The cells are formatted to show times in the AM/PM format but times can be input in either AM/PM format (4:00 PM) or in military time format (16:00). If a shift starts on one day and ends on the next day, you need to add 24 hours to the shift stop time. For example, if the shift starts at 9:00 PM (21:00) and stops at 3:00 AM (3:00) the next day, the stop time needs to be input as 27:00. Not 3:00 AM, but 27:00.

If you are scheduling employees to several different routes put the name of the route in the Shift/Route column. If you do not supply a Shift/Route name, the program will generate one based on the category name. If you have used duplicate category names, and do not specify a Shift/Route name the spreadsheet will assign duplicate Shift/Route names. For example, if you have a category "Manager" and do not supply Shift/Route names for the Manager category, the spreadsheet will name them "Manager 1", "Manager 2", "Manager 3" and so on through "Manager 10". Now if you add a second "Manager" category and not provide Shift/Route names for those shifts, the spreadsheet will assign names "Manager 1", "Manager 2" etc. which will be duplicates of the first Manager category shift names. The Shift/Route name will appear on the "Scheduling" Sheet and on the various schedule output sheets.

If you use an "Off" category for scheduling, be sure to define a Shift/Route name for each of these shifts (Off is fine or you may want some called "Off" and others called "Vacation" or "Training"), or they will not appear on the "Scheduling" Sheet. Also, you should put an "X" in each column next to these shifts in order to make these shifts available for assignments each day on the "Scheduling" Sheet.

If you have specified extra shifts in a category on the Setup sheet, and want to have these in the correct place on the Scheduling sheet in case you need to use them someday, define a shift start and stop time (that you can change later) but do not indicate (with an "X") that the shift is needed on any of the days. This approach will preserve a slot for the future shift.

IV. EMPLOYEES SHEET

Employee names, e-mail addresses, shift time restrictions and employee qualifications are placed in the table on this sheet. You may indicate that an employee is qualified for more than 1 position. For example, an employee may be qualified as a manager and as a driver and if you want that person available for both jobs, put an "X" in both the "Manager" column and the "Driver" column. **If you have used a category name more than once**, the spreadsheet will read only the information you specify for the first occurrence (on the left) of the category name.

If an employee's availability starts one day and ends the next day, you need to add 24 hours to the number you put in the "Latest Shift" column. For example if someone is available from 6:00 PM (18:00) to 6:00 AM the next day, you need to put 30:00 in the "Latest Shift" column. Days when employees will not be available are indicated in the table at the bottom of the sheet. Place an "X" in the day column if the employee will not be available on that day. You may sort the Employee Qualifications Table if you want to put employee names in alphabetical order.

At the top of the sheet is a macro that will sort the employees names in alphabetical order while preserving employee vacations information you have specified on the Vacations sheet. If you need to remove an employees name, simply clear the cells associated with the employee (**DO NOT DELETE THE ROW**) and then sort the employee names to put the blank row at the bottom of the table.

V. VACATIONS Sheet

Up to 10 vacation periods can be specified per employee. The vacations do not need to be in any specific order, and it is okay if you skip columns between vacation periods. If you schedule someone to a shift when he is on vacation, you will be alerted that the person is not available.

VI. SCHEDULING SHEET

On the left side of the sheet is a light green colored column of cells that you can use to assign a bus to the shift/route using the drop-down menu of busses. The drop-down menu contains all of the bus numbers that you put in the table on the Setup sheet. Each bus number has an "A" or "P" appended to it to indicate morning (AM) and afternoon (PM) busses. The bus cell will turn rose-colored if a bus number is used more than once.

The "Scheduling" Sheet is where you assign your employees to various shifts/routes each day for up to 31 days. Select the names of qualified people from the drop-down menus. An employee's name will appear in the drop-down menu if you specified that employee as qualified for the category in the table at the top of the "Employees" Sheet. **All qualified employees will appear twice in the drop-down menu**, once with just the name and again below that with a "-2" following the name. You can therefore assign someone to 2 daily shifts, once with his regular name and once with his "-2" name. Both assignments will be shown on the individual schedules and the group schedule under the employee's regular name.

If a **cell is shaded light gray**, no one is required for the shift according to the information on the "Shifts" Sheet. You can still assign someone to the shift if you want. If you specified that someone is needed for a shift, the **cell is shaded light green**. You should assign someone from the drop-down menu to work this shift.

If you assign someone (or his double "-2") to more than one shift per day, the **cell will turn tan-colored** to indicate there is a problem since only the first (closest to the top of the sheet) assignment will show up on the schedules. If you assigned someone to a shift when they are not available according to the employee start and stop times you specified on the "Employees" Sheet, or if they are shown to be on vacation on the "Vacations" sheet, the **cell will turn rose-colored** indicating there is a problem with the assignment.

If the cell is **rose-colored**, the thin cell to the left of the assignment will be color-coded to indicate the nature of the problem. If the thin cell is **yellow**, the person is not available as indicated on the Vacations Sheet. If the thin cell is **blue**, the shift start/stop time is outside the employee's normal availability as indicated in the "Earliest Shift" and "Latest Shift" columns on the Employees Sheet.

The day names at the top of the sheet are normally turquoise-colored. If you have made a scheduling error the cell will change to a rose color and you need to check the cells in that column for errors as indicated by a color code.

Macro buttons located above each day can be used to remove all old scheduling information from that day. The wider button in the top left corner can be used to remove scheduling information from all days. Macro buttons are also available to copy the Day1 shift assignments to days 2 thru 7 where you can edit them as required to create the schedules for the rest of the week. Other macro buttons are provided to copy the Week 1 shift assignments to Weeks 2 - 5 where you can further edit them to create your schedule.

The Copy & Paste and the Cut & Paste commands as well as the Tools, Options menu have been disabled on this sheet to prevent you from moving the drop-down menus from one cell to another.

The print range has been set to print this worksheet on multiple sheets of paper. If you need only the top portion of the worksheet to be printed, you will need to change the print range.

VII. CALENDAR SHEET

The calendar sheet shows shift assignments for one week. You can select the calendar start date and employee category you would like to display from the drop-down menus above the calendar. Macro buttons to the right of the calendar control the number of employees displayed each day. If you want "Off" assignments to appear on the calendar you need to assign a start and stop time for the "Off" shift on the Shifts Sheet.

VIII. GROUP SCHEDULE SHEET

A group schedule showing each employee's daily start and stop time is provided. If someone is scheduled to a shift in the "Off" Category, the "Off" shift will not be shown in the Group Schedule. In the top-left corner is a place where you can choose to show "Category", "Shift/Route & Bus", "Both" or "Neither" in the Group Schedule.

Some schedulers have imported this sheet into the Microsoft PowerPoint software that in-turn was programmed to present a slide show of the schedule on a monitor in the driver's lounge. About 10 drivers are displayed on each slide and all slides and driver assignments are displayed over the span of a few minutes.

IX. 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.

The Group Schedule 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>

X. LOCATION SCHEDULE SHEET

The location schedule allows you to print a schedule for each location specified on the "Shifts" sheet. The schedule shows employee category name and shift start and stop times. You can choose the location from the drop-down menu in the top left corner of the sheet. You can create and print a location schedule for each location you are staffing. The print macro buttons at the top of the sheet allow you to print the schedule one-week-at-a-time. The two macro buttons on the top left allow you to show or hide the "Category" information.

XI. WEEKLY SHIFTS AND SHIFT REPORT SHEETS

The Weekly Shifts sheet displays a 7 day schedule that looks much like the Scheduling Sheet. You select the first day of the schedule from the drop-down menu at the top of the sheet. The "Click Here to Copy This Sheet to a New Workbook" macro button at the top of the sheet will save the spreadsheet under it's current name and then copy the information on the "Weekly Shifts" sheet to the "Shift Report" sheet (the tab at the far right) and then copy the "Shift Report" sheet into a new workbook that can be saved under whatever name you want.

XII. 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.

XIII. TECHNICAL SUPPORT

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

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