

# S2-Automatic Scheduler Instructions

<b>Section Name</b>	<b>Row Number</b> <a href="#">Click to go there</a>
<b>I. INTRODUCTION</b>	<a href="#">31</a>
<b>II. EMPLOYEES SHEET</b>	<a href="#">38</a>
<b>III. SCHEDULING SHEET</b>	<a href="#">45</a>
<b>IV. STAFFING CHARTS SHEET</b>	<a href="#">56</a>
<b>V. FINAL SCHEDULE SHEET</b>	<a href="#">59</a>
<b>VI. INDIVIDUAL SCHEDULES SHEET</b>	<a href="#">61</a>
<b>VII. CALENDAR SHEET</b>	<a href="#">66</a>
<b>VIII. E-MAIL &amp; ECALENDAR SHEETS</b>	<a href="#">72</a>
<b>IX. vCALENDAR SHEETS</b>	<a href="#">79</a>
<b>X. IMPORTING THE .vcs FILE INTO MS OUTLOOK</b>	<a href="#">86</a>
<b>XI. CAUTIONS</b>	<a href="#">93</a>
<b>XII. TECHNICAL SUPPORT</b>	<a href="#">100</a>

## 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 will automatically assign 5 daily shifts a week to your full time people with any left-over shifts assigned to part time people for up to 4 weeks. If the shifts are 8 hours long, your people will be assigned to 40 hours a week.

## **II EMPLOYEES SHEET**

Insert your employee names and e-mail address (if you want to use the e-mail features of this program) in the table. There are 2 other columns for you to input the employee phone numbers or other information.

The "Group" number for each employee comes from the Scheduling Sheet and determines which shift(s) each person will be assigned. After you have finished with the Scheduling Sheet, you may want to return to the Employees Sheet to see if your employees are in the appropriate group. If someone is in an inappropriate group you will need to copy his or her name to a row associated with the group he or she should be assigned.

The Employee Vacation Table located on the right side of this sheet provides space for you to specify up to 10 vacation periods for each employee. The vacation periods for an individual employee do not need to be in any specific order.

If you do not have enough employees to fill all of the required shifts, the program will add employees called "New Hire 1", "New Hire 2" etc. and will assign shifts to them as required to fill all of your shifts.

## **III. SCHEDULING SHEET**

In the **Shift Start and Stop Times Table** at the top of the page you can define up to 10 shifts. If you have fewer shifts, leave the unused rows blank. In all cases times need to be input in time format. For example, input 1 AM as 1 AM, 1 A, 1:00 or simply 1: but not 1 (without the colon). An afternoon time such as 2:30 PM can be input as 2:30 PM, 2:30 P, or 14:30. If a shift starts at midnight input it as 0 (with or without the colon). If it ends at midnight, you need to input it as either 24:00 or 12:00 PM. If a shift ends on the next day, add 24:00 to the stop time. For example if a shift starts on one day and ends at 4:00 AM the next, input the stop time as 28:00 (not as 4:00 AM).

In the **Shift Staffing Table** below the Shift Start and Stop Times you input the number of employees needed for each shift each day. The number can change from day to day. If the number of people that you specify requires more employees than the spreadsheet can accommodate, a message will appear in the box in the lower right portion of the sheet telling you that you need to reduce the number of people specified. Sometimes the staffing needs you specify in the Shift Staffing table requires the use of part time employees where a "Part Time Employee" is defined as someone who works less than 5 shifts a week. If your daily staffing requirements are highly irregular and the spreadsheet can't determine exactly how many part time people are required, you will be alerted by a message in the box in the lower portion of the sheet.

You need to assign your shifts to groups in the Shift Groups Table. If you have 5 or less shifts, they can each have their own group, otherwise you should assign shifts with similar start and stop times to the same group. All shifts must be assigned to a group and if you want, you can assign a shift to more than one group. This is not usually a good idea, but it can help in some situations. Below the Shift Groups Table is a table that summarizes the number of employees required in each group.

Your employees will be assigned to shifts depending on the group they are in. They can be assigned to any shift in the group so it is important to have the shift times similar within a group to assure adequate rest time between shifts.

**Before you click on any of the scheduling macros** you should return to the Employees sheet to see if your people are in the appropriate group for their shift preferences.

**The Message for Individual Schedules lines** are used for a message that will appear on each of the individual schedules in case you want to communicate a global message to all of your employees.

**The scheduling macros** located at the top of the sheet are used to create your schedules. You can create schedules for 1, 2, 3 or 4 weeks. Use the check box to the right of the scheduling macros to specify if your people should have the same days off for the entire scheduling period or if the days off should be different each week.

The scheduling macros will not work if you have any errors noted in the box in the lower right portion of the sheet.

#### **IV. STAFFING CHARTS SHEET**

Seven daily staffing charts showing staffing levels in 15 minute increments for each day of the week are shown here. The charts reflect the shift times and staffing levels that you input on the Scheduling sheet.

#### **V. FINAL SCHEDULES SHEET**

The scheduling macros store the weekly schedules on this sheet for use in creating the other scheduling output. You can edit the scheduling results if you would like to reassign some shifts. You should take a look at the "Part Time" and "Vac Fill" (people who fill daily slots assigned to those on vacation) people at the bottom of the sheet to be sure that they have adequate rest time between shifts. Your regular employees are assigned shifts within the same group, but the Part Time and Vac Fill people can be assigned to shifts in any group. You can drag and drop shift assignments from one employee to another as necessary to have a reasonable weekly schedule for your Part Time and Vac Fill people. Be sure to move shifts up and down the same day columns and not from one day/column to another.

#### **VI. INDIVIDUAL SCHEDULES SHEET**

Individual schedules are provided for each employee showing their shift assignments each day. Shift start and stop times are also included for the assigned shifts. The schedules are formatted to allow printing each person's schedule on a single sheet of paper. If you have fewer employees than the program is designed for, you need to adjust the print range. You also may have to adjust the page margins in order to fit each schedule on a single page.

#### **VII. CALENDAR SHEET**

The Calendar shows shift assignments for a week. Select the start date and shift to be displayed from the drop-down menus at the top of the sheet. If you select a shift, employees assigned to that shift each day will be displayed. If you select "All", all employees working each day will be displayed along with their shift start and stop times.

Shifts are typically shown in a compressed format to fit on the fewest calendar rows. If you want to expand the calendar such that each employee is on the same row each day, you need to check the "Expand Names on the Calendar" box at the top of the sheet.

## **VIII. E-MAIL & ECALENDAR SHEETS**

When you click the macro button at the top of this sheet, the ECalendar sheet will be sent via e-mail to your employees. Insert your employees e-mail address next to their name on the Employees sheet if you want them to be eligible to receive the calendar. You may also insert other recipient e-mail addresses in the table if there is room. An employee name does not need to be present for the non-employee to receive the e-mail. On the E-Mail 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.

The ECalendar sheet contains the scheduling information on the 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>

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>

## **IX. vCALENDAR SHEETS**

The scheduling information can be saved as a file using the vCalendar data format that can be imported into MS Outlook or other software that can read vCalendar files. The file includes a "SUMMARY" field that shows the employee's name and the assigned shift name and a "CATEGORIES" field that displays the word "Shift". A 7 day schedule for all employees is created on the vCalendar sheet and is saved in the vCalendar file. Select the start date for the file from the drop-down menu and click the "Create Weekly vCalendar File" macro button to create the file. The macro will save scheduling spreadsheet under its current name and then save the vCalendar file in your scheduling directory with the name shown in the cell below the macro button. After the vCalendar file is created, the spreadsheet will close.

A 4 week schedule for a single employee is created on the vCalendar-2 sheet. Select the employee name from the drop-down menu and click on the macro button to create the single employee schedule. The hidden vCal Out sheet is used in the creation of the vCalendar files and should not be deleted.

If there is already a file in your scheduling directory with the same name as the vCalendar file being created by the macro, Excel will ask if you want to replace the old file with the new one. If you select "No" the macro will display an error message. Simply select "End" and the macro will stop. Also, after the vCalendar file is saved, Excel will ask you if you want to save the changes in the ??????????.vcs file. You can select either "Yes" or "No" since the old file is the same as the new file.

## **X. IMPORTING THE .vcs FILE INTO MS OUTLOOK**

In MS Outlook select File, Import and Export. Then choose "Import an iCalendar or vCalendar file (.vcs) and browse to your scheduling directory or other folder where you have stored the vCalendar file. Select file type = vCalendar and all of the .vcs files will be displayed. Click on the one you want to import and then click "Ok". The procedure to import a file into a PDA or other device is probably similar, but you may need to check your operating manual.

If you receive an error when importing the .vcs file into MS outlook, it is probably due to miscellaneous punctuation marks in the "SUMMARY" and/or "LOCATION" lines in the .vcs file. When Excel saves a worksheet as a text file, it puts quotation marks (" ") around lines containing certain punctuation marks such as a comma (,). MS Outlook can't import the lines with the quotes and will give you an error message. You can open the .vcs file with Notepad or other text editor and search for the lines containing quotation marks to locate the miscellaneous punctuation marks causing the problem.

The spreadsheet will convert employee names in the format "Last Name", "First Name" into "First Name" "Last Name" (without the comma) format in the .vcs file, so you can use employee names in the Last Name, First Name format.

## **XI. 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.

**If you want to sort employee names** you should use the macro provided on the "Employees" Sheet that safely sorts employee names along with the other information associated with the employees.

## **XII. TECHNICAL SUPPORT**

Technical Support is available by phone during normal business hours and by fax or e-mail 24 hours per day.

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