

# S21-25-1000 Instructions

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## Office 2007/Excel 2007/Excel for the Mac Note:

This Excel workbook was created with Excel 2003 and is completely compatible with all PC versions of Excel from Excel 1997 to Excel 2007. When used in Excel 2007 it can be saved as either an Excel 1997-2003 workbook or as an Excel workbook with macros (an xlsm file). This workbook does not contain any information outside of the Excel 2003 range of 256 columns and 65536 rows so any Excel 2007 warnings about losing information outside of this range is erroneous and can be ignored. Since some versions of **Excel for the Mac** do not support vBasic code, this spreadsheet may not work properly on a Mac computer.

## 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.

## The Frequently Asked Questions (FAQ) Sheet

This sheet contains Excel tips and pointers related to basic Excel operations that may be helpful to you in using this spreadsheet..

### A. INTRODUCTION

#### Please Read the License on the License Sheet

This spreadsheet can be used to assign 25 employees to 1000 tasks for 1000 user-defined time periods. A scheduling macro is used to move the first 20 time periods off the schedule making room for 20 new ones and effectively makes this a perpetual scheduler.

### B. SETUP SHEET

The schedule start date is specified at the top of the sheet followed by the scheduling increment you wish to use for assigning tasks to people. **In the free trial version the schedule start date has been preset to January 1, 2006.** The time increment can be of any duration and needs to be specified in minutes. If you wish to schedule in, for example, 4 hour blocks, the time increment can be specified as either = 4\*60 or as 240.

A "Daily Times" table is provided for you to specify the hours each day you want to be able to assign people to tasks. A start and stop time can be specified for each week day and for holidays. If you don't need to assign tasks to people on any of those days, simply leave the start and stop times blank.

If you want to be able to assign people to tasks for 24 hours a day, you need to be sure that the daily "Start Time" is the same as the start time for the earliest daily shift used on the Employees sheet to specify employee availability. If it isn't the shift times and the task times will not be synchronized and you will not be able to assign tasks during parts of an employee's shift.

A "Holiday Table" is provided where you can specify up to 20 different "holidays" for use in your scheduling.

The "Assignments sheet has 1000 rows with 1 row per time-period. If you specify that you need to be able to assign tasks to people in 60 minute increments for 24 hours a day and 7 days a week, the "Assignments" sheet will provide rows beginning with the "Schedule Start Date" and going on for 1000 consecutive hours (41.66 days). If, however, you only need to be able to schedule tasks to people from 9 AM to 5 PM on Monday-Friday (or 40 hours a week), the Assignments sheet will go on for 25 weeks (1000/40).

## C. EMPLOYEES SHEET

The "Employee Availability Table" is where you list your employee names and their daily availability.

You can also assign equipment and other non-employee items simply by listing them on this sheet. You can keep like items together when the list is sorted by prefacing employees with an "A-" and other items with a "B-" or "C-" or some other preface to control their placement in the sorted list.

A macro is provided to sort your employee names in ascending order. The macro also sorts the employee names on the "Tasks" and "Assignments" sheets along with any information on those sheets associated with the employee. If you sort the employee names without using the sort macro, the employee-related information on the other sheets will not be sorted and it's relationship to the employee will be lost.

## D. TASKS SHEET

Up to 1000 tasks/jobs/clients or whatever it is you want to assign to your employees can be listed on this sheet in the "Employee Qualifications Table". You can also specify (with an "X") if the employee is qualified to perform the task. If an employee is qualified to perform all tasks you can simply put an "X" in the first (tan-colored) row below the employee name. Likewise, if all employees are qualified to perform a particular task ("Vacation", for example), put an "X" in the tan-colored column to the right of the task name. If all employees are qualified for all tasks you can simply put an "X" in the top-left tan cell.

Macros are provided to sort the task names and to delete the task names and the employee qualifications.

## E. ASSIGNMENTS SHEET

Tasks are assigned to employees on this sheet for up to 1000 time periods. Drop-down menus used to assign tasks to people contain only those tasks you specified on the "Employees" sheet that the employee is qualified to perform. The date, day and time are shown on the left and assignments are made in the columns provided on the right. If a person (or task) listed across the top of the sheet is not scheduled for a particular time slot the scheduling cell will be light turquoise and no names will appear in the drop-down scheduling menu.

Three macros are provided at the top of the sheet. The one on the left can be used to move all assignments (and times) up the sheet 20 rows. You can run the macro as many times as you want in order to move old assignments off the sheet to make room for new assignments in the rows at the bottom of the sheet.

The macro that moves assignments up the page will not work if any of the 20 rows contains a day and time that has not yet become history. **On the free trial version the macro will not advance the schedule past January 2007.**

The other two macros can be used to either reset all of the times to those that you specified on the "Setup" sheet or to delete all assignments.

## **F. TASK COUNT SHEET**

You can select up to 10 tasks (from the drop-down menus at the top of the table) for a count of the number of people assigned to the task each time-period on the "Assignments" sheet. Data filters are provided to allow you to select the items in each column you want to have displayed.

## **G. TASKS OUT SHEET**

This sheet shows all of the task assignments in ascending day and time-order for each employee starting with the first one on the Employees sheet. You can filter the task assignments to display only the desired Date, Day of the Week, Task Start Time, Employee Name or Task Name by clicking on the little down arrow in the table header row and selecting the item you would like to be displayed. You can filter the data on more than one column by selecting a filter in multiple columns.

## **H. 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.

**Be careful if you copy cells on the Assignments sheet.** If you copy a task from one cell to another be sure that you do not copy it to a gray-colored cell because a gray-colored cell indicates that the employee will not be there to perform the task.

## **I. 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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