MTS-25-25 Instructions

Multi-Task Scheduler for 25 Employees and 25 Daily Tasks

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

This Excel workbook was created with Excel 2007 for the PC and contains features that are not supported by earlier versions of Excel. 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, right-click on the sheet tab and select "Hide". To unhide a sheet, right-click on any sheet tab and select "Unhide" to see a list of hidden sheets. Select the one that you want to unhide.

Introduction

This spreadsheet allows you to assign 25 daily tasks to 25 employees for 7 days. Each employee can be assigned to as many tasks as necessary each day and as many people as you need can be assigned to a single task. You will be warned if you assign someone to a task when he is not available thereby avoiding scheduling errors. Time is tracked in 15 minute increments for the purpose of determining if an employee is scheduled to be available and for finding overlapping task assignments.

A. Employees Sheet

The first day of the schedule goes in the cell provided at the top of this sheet. If you leave this cell blank the first day will always be "today" and you will be able to schedule the next 7 days.

A table is provided where you can list employee names and their daily availability. Up to 3 daily availability "blocks" can be specified for each employee. Times can be input in AM/PM format such as 9:00 AM or 9 A or in 24 hour format (military time) such as 9:00. They will be displayed in 24 hour format to save space. If you have any overlapping times for an employee none of the time blocks will be read by the program and the employee will be considered as unavailable.You will be warned if you enter an employee name more than once and if you specify overlapping availability "blocks" for someone. Cells with duplicate names will turn **pink** and a duplicate name message will be shown in the cell at the top of the Employee Name column. If a name is entered more than once the time blocks will not be read for that name and the person will be considered unavailable. You will be alerted to overlapping time blocks by the 3 time blocks turning **blue**.

If an employee is available for overnight tasks you can specify an "Out" time later than midnight or 24:00. If the Out time is on the next day you need to add 24:00 to it so, for example, if someone is available from 9:00 PM until 7:00 AM tomorrow you need to specify the "In" time as 21:00 and the "Out" time as 31:00 (7:00 + 24:00). The latest "Out" time allowed is "tomorrow" at noon or 36:00. **If you input out times on Saturday that end "tomorrow" those "next day" times will be applied to Sunday.** If the employee Out time is on the next day the **cell will be darker, the font will be bold and the border will be solid**.

If you want to remove an employee you can simply delete the employee name and daily availability times. **DO NOT DELETE THE ROW.** If you want to add an employee name you can do that at the bottom of the list or in an empty row. **DO NOT INSERT A NEW ROW.**

You can sort employee names and their availability times by clicking the sort macro button at the top of the sheet. The macro also sorts employee qualifications and task assignments on the daily scheduling sheets so the connection will remain between employee, qualifications, and assigned tasks.

B. Tasks Sheet

Seven daily task tables are provided for you to list up to 25 different tasks each day. Each task needs a name, a start time and a stop time. There is also a place for you to specify the number of people required for the task. If you enter other task information and leave the # Required cell blank the program will assume that you need one person assigned to the task.

Times can be input in AM/PM format such as 9:00 AM or 9 A or in 24 hour format (military time) such as 9:00. They will be displayed in 24 hour format to save space. The stop time needs to be later than the start time and if it isn't the cell will turn pink to warn you of this problem. If the times are not adjusted the task will be ignored and any assignments on the 7 daily scheduling sheets will be ignored.

If you have a task that begins one day and ends the next day you need to add 24:00 to the end time. For example if the task starts at 10:00 PM or 22:00 and ends the next day at 6:00 AM, you need to input the end time as 30:00 (24:00 + 6:00). The latest end time allowed is noon on the next day or 36:00. If the task end time is on the next day the **cell will be darker, the font will be bold and the border will be solid**.

C. Emp Quals Sheet

You need to specify which employees are qualified to perform each task by placing an "X" in the connecting cell. The "X" can be selected from the drop-down menu, it can be typed in, or it can be copied from another cell. You can specify that an employee is qualified to perform all tasks by placing an "X" in the first column after the employee name. You can also specify that all employees are qualified to perform a task by placing an "X" in the first row below the task name. You can also specify that all employees are qualified to perform all tasks by placing an "X" in the top left cell in the table. If you want to specify that only certain people are qualified to perform certain tasks you need to place an "X" in the cell that connects the employee name with the task name.

You will be able to schedule only "qualified" employees to the tasks on the seven daily scheduling sheets.

D. Daily Scheduling Sheets

The employees and their availability "blocks" that you have specified on the "Employees" sheet are shown on the left side of the scheduling sheets and the task names and times that you defined on the "Tasks" sheet are listed at the top of the scheduling sheets. Employee out times and task stop times that are on the next day will be in a darker colored cell and will be bold.

Tasks that an employee is qualified to perform are highlighted in light green cells and the drop-down menus in these cells contain an "X" that you can use to assign someone to a task. Tasks that an employee is not qualified to perform are contained in a light gray cell and the drop-down menus in those cells are blank. You can assign tasks to employees by placing an "X" in the connecting cell. The "X" can be selected from the drop-down menu, it can be typed in, or it can be copied from another cell. If you assign a task to someone when he is not available, all of the "X" cells for that person **will turn pink** and none of the tasks in the pink cells will be included in the various daily counts or output schedules.

The drop-down menus will contain an "X" only if the employee is qualified for the task. If you copy an "X" from a cell into a cell of an unqualified employee, **the cell will turn red** to warn you that an unqualified person has been assigned to the task. **The "unqualified" person will be accepted** by the scheduling logic and will appear on all output reports.

The total number of people qualified for each task and the number that you have assigned to each task is shown above the task name at the top of the sheet. If you need to add more people the "Number of People Assigned" **cell will be light green** and if you have added to many **it will be pink**. If you have specified the correct number the **cell will be turquoise**.

On the right side of the daily scheduling sheets is a chart area that shows the availability of each person in 15 minute blocks. The cell will be gray if the individual is available and white if he is available during that 15 minute period. The **cell will be pink** if someone is assigned to a task during a time period he is unavailable.

At the top of the sheet, above the gray and white cells is a chart that shows the number of people available each 15 minute period.

E. Emp Schedules Sheet

This sheet can display one employee schedule for the week. You need to select the employee name from the drop-down menu at the top of the sheet and up to 100 tasks assigned to that employee will be displayed. If someone is assigned to more than 100 tasks some of the tasks will not be displayed on this sheet. They will, however, be included in the hours reported on the "Task Hours" sheet and on the vCalendar files that you generate.

If you click the "Click to E-Mail Schedule to Selected Employees" macro button at the top of the sheet, an employee schedule will be sent to each employee that you have selected on the "e-Mail" sheet if you use one of the Microsoft e-mail clients (Outlook Express, Outlook, Windows Mail). The macro will copy the assignments on the "Emp Schedule" sheet to the "E-Emp Schedule" sheet and send it as a 1 sheet Excel workbook as an e-mail attachment. The macro will cycle through all employees that you have selected on the 'e-mail" sheet and send each one a schedule. 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

You can easily toggle the message on and off in Outlook Express and in Windows Mail but it is more complicated in Outlook. Therefore you can toggle it off in OE and WM before you send the files and toggle it back on after you have finished.

F. Task Schedules Sheet

The table on this sheet will display the names of everyone assigned to the task that you select from the drop-down menu. Up to 25 employee names can be shown in the table if necessary.

The task schedule can be sent via e-mail as a single sheet Excel workbook to the employee you select from the drop-down menu at the top of the sheet when you click the macro button labeled "Click to E-Mail Schedule to Selected Employee". If you want to send the task schedule e-mail to more than one employee, you will need to repeat the process for each recipient. The employee must have an e-mail address specified on the "E-Mail" sheet in order to have the task schedule e-mailed to him.

G Emp Hours Sheet & Task Hours Sheet

The tables on these sheets show daily and weekly hours assigned to each person and hours assigned to each task.

H. All Schedules Sheet

'This sheet shows all of the task assignments in ascending order beginning with the first task on the first day. There are thousands of rows in the table to hold all possible task assignments so there will be many blank rows. 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.

I. E-Mail Sheet

All of your employees are listed in the table on this sheet. You may insert each employee e-mail address in the column next to the employee name. If you want the employee to be sent a copy of his "Emp Schedule" you need to place a check mark in the box next to the employee name. If you want everyone (with an e-mail address) to receive a schedule you can simply check the "Send to All Employees" box at the top of the page.

J. 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 one employee** is created on the vCalendar sheet and is saved in the vCalendar file. Select the employee for the file from the drop-down menu and click the "Create vCalendar File Now" macro button to create the file. The macro will save scheduling spreadsheet under it's 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 1 day schedule for all employees is created on the vCalendar-2 sheet. Select the date from the drop-down menu and click on the macro button to create the single day 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.

K. Importing the *.vcs File Into the Microsoft Outlook Calendar

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. You should leave a space between the comma and the "First name".

L. Sheets for use with the QuickBooks Accounting Software

If you use QuickBooks Pro accounting software, you can create a "Timer Import File" that you can import into QuickBooks Pro to transfer scheduling information for use in employee payroll and client billing.

If you do not plan to use this feature, you can either hide or delete the 4 worksheets associated with the QuickBooks Pro TIF (Timer Import File) by right clicking on the sheet tab and selecting Hide or Delete.

One sheet is provided for you to associate employees and tasks in this spreadsheet with clients and employees in your QuickBooks Pro software and three sheets are used to create the TIF (Timer Import File) and allow you to edit it before exporting it for use in QuickBooks Pro.

You need to create and edit the QB TIF sheet once a week to make the files to import into QuickBooks. If you use this multi task scheduler in the 7 day forward mode (by leaving the "Day 1 Date" on the Employees sheet blank) you need to be careful not to wait more than a week between creating the QB TIF EDIT file or you will miss one or more days of scheduled tasks. If you use the scheduler with a fixed "Day 1 Date" then you can open the file any time in the future to create the QuickBooks file.

L1. The QB TIF Sheet

This sheet is saved as a tab delimited text file to create the QuickBooks Pro Timer Import file. The sheet is normally hidden and can be viewed by right-clicking on any of the sheet tabs and selecting "QB Pro TIF". You can then hide the sheet by right-clicking on the sheet tab and selecting "Hide". The sheet is visible on a new spreadsheet to allow you to create the Timer Header Block. Only the top 2 rows and Columns A to G are visible. The other rows and columns are hidden from view.

You need to create the Timer Header Block (TIMERHDR) found on the first two rows of the "QB Pro Timer Import File" Sheet. The TIMERHDR is unique to your QuickBooks Pro company and needs to be created (only once) before you use the file export/import feature in QuickBooks Pro to transfer you scheduling activities into QuickBooks Pro. Step-by-step instructions to create and copy the TIMERHDR follows:

1. In QuickBooks Pro, select **F**ile from the menu then select Ti**m**er. If you do not see "Timer" as an option, it may be that you do not have QuickBooks Pro, but QuickBooks, or that you did not choose to install that feature when you installed QuickBooks Pro on your computer.

2. Choose "**E**xport Lists for Timer and click OK. Type in the following file name "timer export.iif" (without the "").

3. Select the directory (folder) where you would like to save the file (why not the directory with your scheduling program)

4. Select "Save" or "OK" and you will receive a message "Your data has been exported successfully". Click OK.

5. Open Microsoft Excel and then open this spreadsheet. Go to the "QB Pro Timer Import File" worksheet.

6. Unprotect the "QB Pro Timer Import File" Sheet (Review, Unprotect Sheet).

7. Open the "timer export.iif" file in Excel. In the "Files of type" space at the bottom of the Open box, select all types (*.*) and then click on the file named "timer export.iif"

8. Put a check mark in the box (circle) marked "Delimited" and click "Next".

9. Put a check in the box (circle) marked "Tab". Be sure no other option is selected. Click "Finished".

10. Copy Cells A1:G2 (top 2 rows and first 7 columns) from "timer export.iif to Cells A1:G2 of the "QB Pro TIF" Sheet. (Highlight the cells to be copied, right click the mouse and select Copy, go to cell A1 of the QB Pro TIF worksheet, right click the mouse and select Paste, Special, Values, OK).

11. In column F row 2 (under the FROMTIMER heading) change the N to Y. (This indicates that, Yes, the information is coming from the Timer).

12. Protect the "QB Pro TIF" Sheet (Review, Protect Sheet) in this spreadsheet.

13. Hide the "QB Pro TIF" Sheet by right-clicking on the sheet tab and selecting "Hide".

L2. The QB Setup Sheet

Scheduling tasks and employees need to be associated with clients/jobs and employees in your QuickBooks Pro software. This association along with some other task information that may be of interest to QuickBooks Pro is performed on the QB Pro Setup Sheet.

The QuickBooks Pro Task/Client List Table shows the names of the scheduling tasks and the "Item" you may have specified on the Input Sheet. You need to specify the QuickBooks Pro client or job to be associated with each of the scheduling tasks. You can also provide the Project Name, Notes and Billing Status for use in QuickBooks Pro. A brief description of each of these QuickBooks Pro fields is provided in a note associated with the name of each field. To view the note, you need to place the cursor over the cell containing the note. If you need additional information about any of these fields, you need to consult your QuickBooks Pro documentation.

If you leave the "Notes" field blank, the program will fill this field in the QuickBooks Pro Timer Import File with the task start and stop time.

If you named the scheduling tasks the same as your QuickBooks Pro clients, you click the macro button above the table to copy (and paste special, values) the Scheduling Task Name column into the QB Pro Client Name column.

The QuickBooks Pro Employee Name table is where you specify the QuickBooks Pro employee name to be associated with each scheduling program employee name. You can also specify the Payroll Item to be assigned to each employee. Payroll Items can be selected from the drop-down menu. The source of the items in the drop-down menu is the table on the right. This table has been loaded with typical payroll items. If you have created additional payroll items for use in QuickBooks Pro, you can put them in the table and they will be available on the drop-down list.

If your Scheduling Employee Names are the same as your QuickBooks Pro Employee Names, you can click the macro button above the table to copy (and paste special, values) the Scheduling Employee Names column into the QuickBooks Pro Employee Names column.

Above the Payroll Item Menu List is a macro button that you can click to create a QuickBooks Pro Timer Import File that you can then edit before creating the final QuickBooks Pro Timer Import File.

L3. The QB TIF Edit Sheet

If the actual time spent on a task is not the same as the scheduled time, you may want to edit the "QB Pro Timer Import File" before you save it for use in Quick Books Pro. After the week is over and the tasks have been performed, open the spreadsheet for the past week and go to the "QB Pro Setup" Sheet and click on the macro button to edit the QB Pro Timer Import File. The macro copies information from the hidden "QB Pro TIF Draft" worksheet to the "QB Pro Edit" worksheet.

At the top of the "QB Pro TIF Edit worksheet are column headers and arrow buttons. First we will discuss the column headers and then the arrow buttons.

TIMEACT: This is tells QB Pro that the information on this line is for use in the timer account. Do not edit this column.

DATE: This is the date that the task was performed.

JOB: This column contains the QuickBooks Pro task or client names.

EMP: This column has the QuickBooks Pro employee names.

ITEM: If you modified the "Task/Client Name" on the "Input" sheet by placing a dash (-) and additional information after the "Task Name", the information following the dash will appear here.

PITEM: This is the "Payroll Item" assigned to the employee on the "QuickBooks Pro Employee List" on the "QB Pro Setup" Sheet.

DURATION: This is the amount of billable time (in hours and fractions of hours) the employee spent on the task. The value in this field is based on the task scheduled start and stop times. This is the field that is most often edited. If the task was not performed for any reason, you can either erase the whole line (do not delete the line itself, however) or simply change the duration to zero.

PROJ: This is the "Project Name" assigned to this client on the "QuickBooks Pro Task/Client List" on the "QB Pro Setup" Sheet.

NOTE: This is the "Note" assigned to this client on the "QuickBooks Pro Task/Client List" on the "QB Pro Setup" Sheet. If you did not assign a "Note" to this client, the column contains the scheduled task start and stop times.

BILLING STATUS: This is the "Billing Status" assigned to the client on the "QuickBooks Pro Task/Client List" on the "QB Pro Setup" Sheet.

The Arrow Buttons are data filters that you can use to easily locate any of the records on the sheet. When you click on an Arrow Button, a list of data entries will be displayed. Click on the data that you would like to see. For example, if you want to see all of the records for a certain client, click on JOB Arrow Button to display all of the JOBS (clients), and then select the client name from the drop-down list. Now, only records for that client will be displayed. If you want to further restrict the display to a specific date, select the Arrow Button in the DATE column and select the date of interest. Now only the record(s) for the selected client and date will be displayed.

Once you have found the record of interest, you can edit it.

After editing the record, you can choose to display all records by clicking the Arrow Button and selecting all (at the top of the list). The down arrow on the Arrow Button is blue-colored if you are filtering data in that column, and black if you are not filtering the data (if all is selected).

The macro button "Click Here to Save the QB Pro Timer Import File for This Week" located at the top of the worksheet can be selected whenever you are finished with your edits. The macro saves the workbook under its current name and then copies the QB TIF Edit sheet to the QB TIF sheet and saves that sheet as a file called "Quickbooks Timer Import File Created on mm-dd-yy-hh-mm-ss.iif" ("Quickbooks Timer Import File Created on month-day-year-hour-minute-second.iif"). The file will be stored in the last folder that you used to open or save a file which is usually in the same directory (folder) where the spreadsheet exists.

L4. Importing the QB Timer Import File into QuickBooks

Proceed as follows to import the QB Pro Timer Import File into QuickBooks Pro:

1. In QuickBooks Pro, select **F**ile from the menu then select Ti**m**er.

2. Choose "Import Activities from Timer" and click OK.

3. Select the "Quickbooks Timer Import File Created on mm-dd-yy-hh-mm-ss.iif" file

4. You may get a message "This import file was created by a different version of the QuickBooks Pro Timer". If you do, simply click "Ok".

Your employee timesheet data is now available for use in QuickBooks Pro.

CAUTION: Import each week's file into QuickBooks Pro only once. If you import it more than once, each entry for the week will be duplicated, leading to double-billing of clients and double-paying of employees.

M. 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 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.

N. 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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