

S23-Quick & Easy Scheduler - 25 Instructions

This spreadsheet can be used to schedule up to 25 employees to as many as 10 shifts a day for 4 weeks using drop-down menus to quickly and easily assign shifts to your employees.

Watch for Cell Comments with Additional Instructions

Throughout the spreadsheet many of the column headers have comments (indicated by a small triangle in the upper right corner of the cell) describing the contents of the columns. To view the comment, simply place your cursor over the cell. **This cell has a comment as indicated by the small triangle in the top right corner.**

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 xlsx 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.

A. Scheduling Sheet

The light green cells are for data input and for scheduling. The other cells are protected and contain formulas that should not be disturbed.

The **schedule start date** should be input in the cell provided just above and to the right of the "Employee Names". You can use any date format that you wish including 11/2/2009, 12-Dec-2009, etc but the cell is formatted to display the date in 12-Dec-2009 format.

A column is provided for you to input your **employee names**. If you copy the names from another Excel workbook you should use the Paste/Special/Values technique in order to preserve the formatting on the Scheduling sheet. If you enter a name more than once the cells with the duplicate names will turn rose-colored and an error message will appear at the top of the "Employee Names" column.

A macro is provided (in the "Employee Name" cell) that you can use to **alphabetically sort the names** and all of the data associated with that person. The macro also sorts the names and e-mail addresses on the "E-Mail" sheet. The macros will unprotect the sheets before sorting and then protect it afterward. **If you have protected the sheets with a password**, you will need to unprotect them before running the macro. Otherwise you will receive an error message.

If you want to **remove an employee** you can simply delete the name and all of the information on the employee's row. **Do not delete the row** for it will corrupt the spreadsheet logic. And, if you want to **add an employee** simply put the new person's name at the bottom of the list and specify his or her availability, **Do not add a new row** for it will disturb the spreadsheet logic. After adding or removing employees you can sort the list to put it in alphabetical order and to move the blank rows to the bottom.

Above the "Employee Names" column is small table where you can enter your **shift names**. Shift times and paid hours are entered in the table on the Employee Schedule sheet (more on that later). You can give your shifts any names you wish but they should be rather short so they will fit in the space provided in the daily scheduling columns. if you would like, you can have shifts called "Day Off" or "Vac" (for vacation) that you can use to actively schedule these non-shifts.

To the left of the "Employee Name" column are **availability columns** where you can specify the days of the week and shifts that each employee is available to work. Enter an "X" in the cell if the employee is available. The "X" can be selected from the drop--down menu, or entered on the keyboard or copied from another cell.

Since you may not need all of the available shifts, a **macro** is provided to hide the unused shift rows and columns. Another macro is provided to unhide all of the shift rows and columns in case you need to add more shifts. The macros will unprotect the sheet before hiding or unhiding the columns and then protect it afterward. **If you have protected the sheet with a password**, you will need to unprotect it before running the macro. Otherwise you will receive an error message. A macro is also provided above the availability columns that you can use to **"Delete All Assignments"** in the 28 daily scheduling columns.

At the very top of the sheet is a **"Daily Shift Needs"** table where you can enter the number of employees you need on each shift each day. This information will be used to let you know if you are over or under the target number for each shift.

Shift assignments are made using the drop-down menus in the columns to the right of the "Employee Names". You can assign only one shift to each person each day so if you want to assign a double shift you need to define it in the shift names table.

Below the "Daily Shift Needs" table is the **"Shift Count"** table that reports the total number of employees assigned to each shift each day. If the number of employees is less than specified in the daily shift needs table the cells will be yellow and if the number of employees is more than specified in the daily shift needs table the cells will be aqua. If the number of employees is equal to the number specified in the shift needs table the cell will be turquoise.

B. Employee Schedule Sheet

One **employee schedule** at a time can be displayed on this sheet. You need to select the employee using the drop-down menu at the top of the page.

On the right side of the sheet is the "**Shift Definition Table**" where you can enter shift start and stop times as well as the number of paid hours for each shift that will be displayed on the employee's schedule.

At the top of the sheet are two macro buttons. The "**E-Mail Schedule**" macro will cycle through everyone you have specified on the "E-Mail" sheet and send them their schedule. The macro copies the schedule to the "**Eschedule-Emp**" sheet and then attaches that sheet as a single Excel sheet to an e-mail addressed to the employee.

If any of your employees 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 program will probably alert you that Excel 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 program to allow Excel 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. It is rather easy to change your e-mail security settings so you can switch back and forth to allow Excel to send messages when necessary and to prevent unauthorized use of your e-mail program when you are finished with your scheduling. 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>

The "**E-Mail & Print Schedule**" macro will cycle through all of your employees and if you have specified the employee to receive an e-mail schedule it will send one by e-mail and it will then print a schedule for your other employees who has been assigned one or more shifts. If you want to print a single schedule you can simply select the employee name and then click the Excel print icon (button). If you want a printed schedule for everyone you need to uncheck everybody's e-mail "send" box on the "E-Mail sheet (or the "send to everyone" check box).

C. Shift Schedule Sheet

The table on this sheet shows up to 50 people assigned to the selected shift for one week. You need to select the week and the shift using the drop-down menus in the cells at the top of the sheet.

Since you may not need all 25 rows to display the people assigned to the shift, a macro has been provide at the top of the sheet to "**Hide Unused Rows**". Another macro has been provided to "**Show All Rows**". The macros will unprotect the sheet before hiding or unhiding the columns and then protect it afterward. **If you have protected the sheets with a password**, you will need to unprotect them before running the macro. Otherwise you will receive an error message.

The "**E-Mail Schedule**" macro will send the schedule via e-mail (see above for more details on the steps involved) to the one or two people specified on the "E-Mail" sheet to receive the schedule for the selected shift.

D. 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.

Do not change the Eschedule-Emp or the Eschedule-Shift sheet names because the automatic e-mail macros require these sheet names.

E. Technical Support

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

Phone: (208) 855-2502

Facsimile: (208) 855-2503

e-mail: techsupport@shiftschedules.com

Copyright © 2009 Richard A Chapman
All Rights Reserved