

S24-Break Scheduler for 100 Employees Operating Instructions

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.

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.**

1. Introduction

This spreadsheet can be used to schedule up to 3 breaks per shift for up to 25 shifts and 100 Employees for a week. You can schedule 1 to 6 break "groups" per shift in order to spread the breaks over time and avoid large disruptions in your workforce.

2. Shifts Sheet

A table is provided for you to define your shifts and breaks and below the scheduling table is a chart that shows your staffing levels during each 5 minute period of the day. The light green cells are for data input and the other cells are used to report the progress of your break scheduling.

Up to 3 different breaks and 6 different break groups can be used on each shift. The breaks are defined by a start time and a duration (length) and need to be input in chronological order with Break #1 starting before Break #2 which starts before Break #3. If they are not input in this order the cells will turn red and the shift staffing will not be included in the staffing chart. Break groups are scheduled for breaks in the order of their group number with group 1 going on break first (at the break start time) and group 2 following after group 1 returns (at the break start time plus the break length), and so on for all of the groups.

The break scheduling logic assumes that the same number of employees will be in each break group (rounded off to avoid fractional employees) so if you have 2 break groups, half will be in one group and half in another. If there are any employees left over after rounding off they will be placed in the last group.

Since breaks can be calculated for a whole week and you are able to specify days off for your employees (on the "Employees" sheet) you are allowed to select which weekday you would like to be used when displaying your staffing levels (in the chart at the bottom of this sheet). If you leave the day blank, the charts will show staffing levels for a typical day when everyone works and nobody has the day off.

There are two basic approaches to break scheduling with one approach having your employees always assigned to the same break groups (and break times) which leads to uneven staffing levels during breaks because employee days off are probably not coordinated with break times. For example if breaks are set up with 4 break groups so 25% of your workforce goes on break at the same time, this will occur only if your employee days off are evenly distributed by break group. In cases where days off are not evenly distributed by break group, the number of people going on break at a particular time will be different each day. The chart at the bottom of the page will show how your staffing levels during breaks varies from day-to-day as you select different days to be displayed.

If you need your daily staffing levels to remain constant during breaks you can set up the breaks such that each employee may be assigned to a different break time each day of the week in order to maintain constant staffing levels during breaks. In order to do this you will need to group your employees by days off. For example, everyone with Monday and Tuesday off will be in the same group and likewise for people with other common days off pairs. Next you will need to define different shifts for each group of employees (with the same days off). For example you can have a shift called "Days-SM" for employees working the day shift with Sunday and Monday off and another shift "Days-MT" for those on the day shift with Monday and Tuesday off. And so on for all of your shifts and days off combinations. Since this break scheduler can schedule up to 25 shifts, you are able to schedule up to 3 daily shifts and 8 days off pairs or 2 daily shifts and 12 days off pairs.

If you choose (on the Employees sheet) to have break groups automatically assigned to your employees, the scheduling logic will assure that the same number of people go on each break each day of the week so you don't have to deal with uneven workforce levels.

At the top of the sheet is a check box that you can use if you want to see your staffing levels based on the break groups you assign to your employees on the "Employees" sheet instead of the default "same number in each group" levels.

If you define breaks such that the breaks overlap the erroneous times will be highlighted and you will need to change them or the shift staffing will not be included in the staffing chart. This means that all of the groups need to finish Break #1 before anyone can be scheduled for Break #2 and so on for Break #3. Also, all groups need to finish their last break before the shift ends.

On the right side of the table are 3 columns showing the shift length and the maximum and minimum work periods without a break. At the top of the break columns are cells where you can specify minimum and maximum times between breaks and if there are violations the cell color will turn pink to warn you of the problem.

If you define shifts with more employees than can be handled by the spreadsheet some shifts will be ignored and you will be alerted to this error by a message at the top of the table.

3. Employees Sheet

A table is provided for you to input your employee names and the shifts they are assigned and the break group you want to assign to them. The shift needs to be one that you defined on the "Shifts" sheet and can be selected from the drop-down menu or typed in or copied from another cell. The break group also needs to be one that you defined on the "Shifts" sheet and can be selected from the drop-down menu or typed in or copied from another cell.

You can also specify (with an "X") the days off for each employee for use in calculating daily break schedules and employee counts.

The "Shifts To Go" column on the left reports the number of people who still need to be assigned to the shift. The cells in this column are color-coded and will be **blue** if you still need to assign people to a shift and **rose** if you have assigned too many people to the shift. You will also see an error message in one or more of the cells at the top of the table.

Break groups are assigned in the column to the right of the "Employee Name" column. The small "Break Group" table on the right side of the sheet shows the status of your break assignments. If breaks remain to be assigned the cell will be blue and if you have assigned too many the cell will be yellow. The over and under values reported are for the situation when nobody has the day off (the selected day on the Shifts sheet is blank). When assigning individual employees to the various break groups you don't have to assign the same number to each group so if you want, for some reason, to put most of your employees in one break group and just a few in other groups you can do that.

If you prefer to have the program automatically (and randomly) assign break groups to your employees you can click the macro button at the top of the sheet. The macro will fill in any blanks in the "Break Group" column which means that you can assign some people to a break group and then let the program fill in the rest. Be sure to delete any old break assignments that you want to have replaced by the automatic break group logic.

Sorting macros are provided at the top of the table in case you want to sort your employees alphabetically by name or by shift or by days off.

Also at the top of the sheet are various scheduling status messages. If the cell is rose colored the item requires your attention and if it is aqua everything is okay.

If you have manually assigned break groups to your employees and have not used the default number for each group you will get a break group warning and the break group summary table will show some errors. It is okay to ignore these error warnings if you wish.

4. Break Times Sheet

All breaks for all groups and all shifts are summarized on this sheet. Macros are provided to hide unused rows and columns.

5. Break Roster

Employees in each break group are shown in the table for the shift that you select in the box at the top of the sheet. If you have selected a weekday from the drop-down menu at the top of the "Shifts" sheet, breaks for only that day will be displayed. There are macros to hide and unhide the unused rows and columns. These can be used to avoid empty rows and columns if you print this table.

6. Employee Schedules

All of your employees are listed here along with their shift assignments and break schedules. If you have selected a weekday from the drop-down menu at the top of the "Shifts" sheet, break schedules for only that day will be displayed. Macros are provided to hide the unused rows which helps when printing the table.

7. Technical Support

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

Phone: (208) 855-2502

Facsimile: (208) 855-2503

e-mail: techsupport@shiftschedules.com

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