

# S8-Daily Tasks Instructions

## SHIFT SCHEDULING PROGRAM OPERATING INSTRUCTIONS Daily Shifts & Task Schedules for 25 Employees

<b>Section Name</b>	<b>Line Number</b> <a href="#">Click to go there</a>
<b>I. INTRODUCTION</b>	<a href="#">32</a>
<b>II. SETUP SHEET</b>	<a href="#">40</a>
<b>III. SHIFTS SHEET</b>	<a href="#">46</a>
<b>IV. EMPLOYEES SHEET</b>	<a href="#">53</a>
<b>V. EMP TIMES SHEET</b>	<a href="#">56</a>
<b>VI. SCHEDULING SHEET</b>	<a href="#">58</a>
<b>VII. TASKS SHEET</b>	<a href="#">64</a>
<b>VIII. TASK ASSIGNMENTS SHEET</b>	<a href="#">66</a>
<b>IX. WAGES SHEET</b>	<a href="#">73</a>
<b>X. BUDGET SHEET</b>	<a href="#">78</a>
<b>XI. INDIVIDUAL SCHEDULES SHEET</b>	<a href="#">83</a>
<b>XII. E-MAIL &amp; ESCHEDULE SHEETS</b>	<a href="#">85</a>
<b>XIII. GROUP SCHEDULE SHEET</b>	<a href="#">87</a>
<b>XIV. LOCATION SCHEDULE SHEET</b>	<a href="#">91</a>
<b>XV. HOURS SUMMARY SHEET</b>	<a href="#">95</a>
<b>XVI. vCalendar SHEETS</b>	<a href="#">98</a>
<b>XVII. IMPORTING THE .vcs FILE INTO MS OUTLOOK</b>	<a href="#">102</a>
<b>XVIII. CAUTIONS</b>	<a href="#">108</a>
<b>XIX. TECHNICAL SUPPORT</b>	<a href="#">114</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 can be used to schedule 25 people in 15 categories for one week. A category may be a job title (Manager, etc.), a department (Men's Clothing, Men's Shoes, etc.) or any other parameter that you need to schedule. You can schedule each employee to both a place and a time. In addition, you can schedule each employee to any one of 50 daily tasks in 30 minute increments. A maximum of 540 task assignments are allowed each week. If you make more than 540 assignments, some will be ignored.

Several cells have comments as indicated by the red triangle located in the top right corner of the cell. Hold the cursor over the cell and the comment will be displayed.

After you read the License, and input your password on the Welcome sheet, you may want to hide these sheets, along with the Order Sheet to make more of the sheet tabs visible at the bottom of the screen. To hide a sheet, simply go to that sheet and select **F**ormat, **S**heet, **H**ide. To unhide a sheet select **F**ormat, **S**heet, **U**nhide, and then select the sheet you want to view.

## **II. SETUP SHEET**

The first day of the schedule is input at the top of the "Setup" Sheet. Below that is a table where you specify the name for each employee category and the maximum number of employee shifts to be associated with that category on the "Shifts" sheet. It is a good idea to provide room for a few more shifts than necessary in order to permit you to add shifts in the future. For example, if you need 10 shifts in the first category, you can enter 15 in the first column of the table in order to provide space for a few additional shifts if you should need them later. The total number of shifts is limited to 83, so if the total of the table's first column exceeds 83, a message will appear at the top of the table to alert you to reduce the total number of shifts.

If you have a **category named "Off"**, anyone assigned to that category will not be shown on the Group Schedule for days they are assigned to a shift in the "Off" category. The "Off" category can be used for regular unpaid days off, paid vacations, paid training, or any other activity you want to define. Be sure to allow sufficient "Shifts" in this category. For example if you sometimes have as many as 3 people on vacation at a time, plus 2 people in training plus 5 people on their regular unpaid days off, you need to specify at least 10 shifts in this category and it may be a good idea to specify 12 or so to provide room for extras.

You can use the same category name more than once if you want. For example, if you have a category called "Waiter" and you specified that you needed 10 shifts in the category. Later you may find that you need another 5 shifts for the "Waiter" category. You can add another category called "Waiter" at the bottom of the list and then you can define additional "Waiter" shifts on the "Shifts" Sheet. In another case, you may have specified that you need 15 shifts in the "Waiter" category, but only defined 10 waiter shifts on the Shifts Sheet. Now, if you go to the Shifts Sheet and define additional waiter shifts, the category and shift information on the Scheduling Sheet will move down to make room for the additional waiter shifts that you just defined. But, since the employee assignments do not also shift down to make room for new assignments, the assignments below the original 10 waiter slots will be incorrect. You can avoid this situation by inputting a shift start and stop time (that can be changed later) but not specifying (with an "X") that the shift is required on any day.

The scheduling logic requires that the first 3 characters in the Category Name be unique for each Category. The Category Name cell will turn Pink if you have more than 1 Category Name where first 3 characters are the same.

### **III. SHIFTS SHEET**

Each category that you defined on the "Setup" Sheet is shown on the "Shifts" Sheet where you specify the start and stop time for shifts associated for each category and indicate which days of the week the shift needs to be filled. One shift needs to be defined per employee. For example if you need 2 clerks from 8:00 AM to 5:00 PM, you need to enter the 8 to 5 shift two times under the "clerk" category. Likewise, if you need a clerk from 8:00 AM to 5:00 PM and another clerk from 10:00 AM to 3:00 PM you need to specify both the 8 to 5 shift and the 10 to 3 shift under the "clerk" category. The cells are formatted to show times in the AM/PM format but times can be input in either AM/PM format (4:00 PM) or in military time format (16:00). If a shift starts on one day and ends on the next day, you need to add 24 hours to the shift stop time. For example, if the shift starts at 9:00 PM (21:00) and stops at 3:00 AM (3:00) the next day, the stop time needs to be input as 27:00. Not 3:00 AM, but 27:00.

Each shift for each category may be given a short name that will appear on the "Scheduling" Sheet and on the "Individual Schedules" Sheet. If you do not supply a name, the program will generate one based on the first 3 letters of the category name. If you have several people in the same category with each one assigned to a specific location, you can indicate the location by the shift name. For example, if you have several sales people, each assigned to a different location, you can specify the location in the shift name. For example, S-MC for Sales-Men's Clothing, S-MS for Sales-Men's Shoes, etc.

If you specified extra shifts on the Setup sheet to allow for future expansion, they will appear on this sheet. You don't need to give them a name, but you should give them a start and stop time (that you can change in the future) so they will appear on the Scheduling sheet to hold the position open for future needs. You don't need to indicate that these extra shifts are needed on any day (with an "X" in the day column) until you are ready to add them.

You have the option of specifying the number of paid hours associated with each shift. If you do not specify the number of paid hours, the program assumes that all hours are paid.

If you use an "Off" category for scheduling, be sure to define a start and stop time for each of these shifts, or they will not appear on the "Scheduling" Sheet. Also, you should put an "X" in each column next to these shifts in order to make these shifts available for assignments each day on the "Scheduling" Sheet.

#### **IV. EMPLOYEES SHEET**

Employee names and qualifications/restrictions are input in the two tables on the "Employee" Sheet. Names, shift time restrictions and employee qualifications are placed in the table at the top of the sheet. If an employee's availability starts one day and ends the next day, you need to add 24 hours to the number you put in the "Latest Shift" column. For example if someone is available from 6:00 PM (18:00) to 6:00 AM the next day, you need to put 30:00 in the "Latest Shift" column. Days when employees will not be available are indicated in the table at the bottom of the sheet. Place an "X" in the day column if the employee will not be available on that day. You may sort the Employee Qualifications Table if you want to put employee names in alphabetical order. The sorting will, however, affect the location of employee names in the bottom table on this sheet.

If you use an "Off" category in your scheduling, be sure to indicate employees eligible for assignments to this category.

#### **V. EMP TIMES SHEET**

The earliest start time and latest stop time for each employee for each day of the week can be placed in this table. If you leave the cell blank, the program assumes the employee is unavailable. If an employee's availability starts one day and ends the next day, you need to add 24 hours to the number you put in the "Latest Shift" column. For example if someone is available from 6:00 PM (18:00) to 6:00 AM the next day, you need to put 30:00 in the "Latest Shift" column.

#### **VI. SCHEDULING SHEET**

The "Scheduling" Sheet is where you assign your employees to various shifts each day for one week. Select the names of qualified people from the drop-down menus. An employee's name will appear in the in the drop-down menu if you specified that employee as qualified for the category in the table at the top of the "Employees" Sheet. If a **cell is shaded light gray**, no one is required for the shift according to the information on the "Shifts" Sheet. You can still assign someone to the shift if you want. If you specified that someone is needed for a shift, the **cell is shaded light green**. You should assign someone from the drop-down menu to work this shift.

If you assign someone to more than one shift per day, the **cell will turn tan-colored** to indicate there is a problem since only the first (closest to the top of the sheet) assignment will show up on the Individual Schedules and on the Hours Summary Sheet. If you assigned someone to a shift when they are not available according to the shift start and stop times and other availability information you specified on the "Employees" Sheet, the **cell will turn rose-colored** indicating there is a problem with the assignment.

Macro buttons located above each day can be used to remove all old scheduling information from that day. The wider button above the first 3 days can be used to remove scheduling information from all days.

The Copy & Paste and the Cut & Paste commands **have been disabled on this sheet** along with the Tools, Options menu to prevent you from corrupting the drop-down menus.

The print range has been set to print this worksheet on 2 sheets of paper. If you need only the top portion of the worksheet to be printed, you will need to change the print range.

## **VII. TASKS SHEET**

Up to 50 daily task names can be placed in the table on this sheet. They are used to populate the task name column headers on the Task Assignments sheet. If the same task needs to be performed on several different days you can copy the task names from one cell to another. You can also sort the various columns alone, or in combination with other columns in the table to arrange the task names in alphabetical order.

## **VIII. TASK ASSIGNMENTS SHEET**

You can assign daily tasks to your employees each day of the week. You can specify the task time increment in the cell at the top of the sheet. There are 60 time-slots per day, so if you use a 15 minute time increment, there will be room for tasks for 15 hours a day. Task names need to be put in the turquoise-colored boxes at the top of each daily table. Task names can be different each day so up to 350 tasks can be assigned in a single week. A single task name can be used more than once in the same day as would be the case if you need more than one person to perform the task at one time. A single task name can also be used in as many days of the week as necessary.

Task assignments are made by selecting names from the drop down menus under the task names. Only people who are scheduled to be at work during a specific time-increment are initially included in the drop-down menus. Once someone is assigned to a task, his or her name is removed from the menu for that time increment so he or she can not be assigned to another task during that time.

If you would like to assign multiple tasks to someone in a single time period, you need to set the spreadsheet to calculate manually (**T**ools, **O**ptions, Calculation, **M**anual) so the name will be available on the menu for another task assignment. People with overlapping tasks will be highlighted in Tan-colored cells.

There are 60 time increments per day for task assignments. The first time-increment is automatically set to the earliest time anyone is scheduled to start work during the week. If you do not need all 60 time-slots, you can hide the unused rows by highlighting the rows and selecting **F**ormat, **R**ow, **H**ide from the top menu on the spreadsheet.

The Copy & Paste and the Cut & Paste commands **have been disabled on this sheet** along with the Tools, Options menu to prevent you from corrupting the drop-down menus.

There is a macro button at the top of the sheet that allows you to erase all of the previous week's task assignments in preparation for making this week's assignments.

## **IX. WAGES SHEET**

Employee hourly wages can be entered on this sheet if you want to use them to calculate weekly payroll budgets. A different wage can be specified for each employee and category. For example if someone is qualified to be both a waiter and a bartender, and the hourly rate is different for these two categories, you can specify the hourly rate for each. Also, if all of your employees do not receive the same wage for a single category, you can specify different rates for each person. If hourly rates are the same for several people or categories, you can input the rate once and copy it to other cells as appropriate.

Note: if you sort the employee names on the "Employees" Sheet, the order of the employee names on this sheet will change and you will need to revisit this sheet to be sure the individual employee rates are still appropriate.

## **X. BUDGET SHEET**

This sheet shows daily and weekly payroll budgets for each category of employee based on the hourly wages you provide on the "Wages" Sheet and the shift assignments you make on the "Scheduling" Sheet. At the top of this sheet are three light green boxes where you specify the number of hours per day and per week that can be worked without paying overtime, and the weekly overtime multiplier. If there is no daily maximum, for example, put 24 in this box. If there is no weekly maximum, put some large number like 200.

On the left side of the table are two light green columns. The first one is where you specify the overtime multiplier applicable to each day of the week. The second column is where you specify a daily salary differential multiplier. For example, if weekend pay is 10% greater than weekday pay, put 1.10 in the cells next to the weekends. Or if holiday pay is 25% greater, put a 1.25 next to the holidays.

The program calculates overtime such that a person receives overtime on both his daily and weekly overtime hours. For example if the daily and weekly maximums are 8 and 40 hours respectively, and someone works 9 hours one day and 8 hours for 4 days, he will be paid overtime at the daily overtime rate for 1 hour and at the weekly overtime rate for 1 hour. To continue this example, assume an employee's basic wage is \$10.00 per hour and the daily overtime rate is 2.0 (double time) and the weekly OT rate is 1.5 (time and a half). In this case he would receive an OT bonus of \$10.00 for the 1 daily OT hour plus \$5.00 for the 1 weekly OT hour for a total bonus of \$15.00 on top of his \$10/hour times 41 hours or \$410 + \$15 for a total of \$425 for the week.

## **XI. INDIVIDUAL SCHEDULES SHEET**

The Individual Schedules show the Position ("Category" Name from the "Setup" Sheet) and the Assignment (shift "Name" that you put on the "Shifts" Sheet) as well as the employee shift start and stop times and the number of hours associated with each shift for each day of the week. They also show up to 18 daily task assignments in 15 minute increments.

## **XII. E-MAIL & ESCHEDULE SHEETS**

You can e-mail individual schedules to your employees in the form of a small Excel spreadsheet. If you would like to do this, you first need to put your employee e-mail addresses in the table on the E-Mail sheet. The ESchedule sheet is created for each employee and attached to an e-mail message to that person when you click on the macro button on the Individual Schedules sheet.

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>

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>

### **XIII. GROUP SCHEDULE SHEET**

A group schedule showing each employee's daily start and stop time is provided. If someone is scheduled to a shift in the "Off" Category, the "Off" shift will not be shown in the Group Schedule. In the top-left corner is a place where you can choose to show "Category", "Shift/Location", "Both" or "Neither" in the Group Schedule. The two macro buttons on the top left allow you to show or hide the additional information.

### **XIV. LOCATION SCHEDULE SHEET**

The location schedule allows you to print a schedule for each location specified on the "Shifts" sheet. The schedule shows employee category name and shift start and stop times. You can choose the location from the drop-down menu in the top left corner of the sheet. You can create and print a location schedule for each location you are staffing. The two macro buttons on the top left allow you to show or hide the "Category" information.

### **XV. HOURS SUMMARY SHEET**

A summary of assigned hours is presented on the "Hours Summary" Sheet.

### **XVI. 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 his Category (as defined on the Setup Sheet), a "LOCATION" field that shows his "Shift/Location" and a "CATEGORIES" field that displays the word "Shift". Additional "LOCATION" fields are used to show the daily task assignments. A one day schedule for all employees is created on the vCalendar sheet and is saved in the vCalendar file. Select the start date from the drop-down menu and click the "Create the vCalendar 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 7 day schedule for a single employee is created on the vCalendar-2 sheet. Select the first day of the schedule from the drop-down menu and click on the macro button to create the single en

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.

## **XVII. 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. Likewise, if there is a comma in the spreadsheet item that appears in the "LOCATION" line of the .vcs file, the "before the comma" letters will be switched with the "after the comma" letters.

## **XVIII. CAUTIONS**

**The Copy & Paste and the Cut & Paste commands as well as the Tools, Options menu have been disabled on the Scheduling sheet** to prevent you from moving the drop-down menus from one cell to another. **Sometimes the disabled copy/paste feature affects other spreadsheets.** If you experience such a problem simply open and then close the "Copy Restore.xls" spreadsheet that is included in the download package and your copy/paste commands will be restored.

**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.

## **XIX. TECHNICAL SUPPORT**

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

**Phone:** (208) 855-2502

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