

# S9-Manual Doctor Calls Instructions

Call Scheduling for 10 Calls and Tasks and 50 Doctors for 53 Weeks

<b>Section Name</b>	<b>Line Number</b> <a href="#">Click to go there</a>
<b>I. INTRODUCTION</b>	<a href="#">31</a>
<b>II. INPUT SHEET</b>	<a href="#">38</a>
<b>III. SCHEDULING SHEET</b>	<a href="#">45</a>
<b>IV. DOCTOR 1 MONTH CALENDAR</b>	<a href="#">50</a>
<b>V. CALL 1 MONTH CALENDAR</b>	<a href="#">52</a>
<b>VI. DOCTORS CALENDAR</b>	<a href="#">54</a>
<b>VII. CALL CALENDAR</b>	<a href="#">56</a>
<b>VIII. E-MAIL AND E-CALENDARS</b>	<a href="#">61</a>
<b>IX. VCALENDAR SHEET</b>	<a href="#">67</a>
<b>X. IMPORTING THE .vcs FILE INTO MS OUTLOOK</b>	<a href="#">72</a>
<b>XI. PASSWORD PROTECTED SHEETS</b>	<a href="#">79</a>
<b>XII. CAUTIONS</b>	<a href="#">83</a>
<b>XIII. TECHNICAL SUPPORT</b>	<a href="#">88</a>

## 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.

## 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.

## **I. INTRODUCTION**

This spreadsheet can be used to manually assign up to 50 doctors to up to 10 daily calls or tasks for 53 weeks. Each call or task can have up to 5 doctors assigned to it if required. If you assign more than 5 doctors to a single call or task, the assignments will appear on the Doctor Calendar and on the Outlook Calendar file (vCalendar sheet), but not on the Call Calendar which is limited to displaying 5 calls or tasks each day.

You list the doctors names and define the calls or tasks on the Input sheet and then assign a call or task to the doctors each day on the Scheduling sheet. Daily scheduling progress and assignment statistics are displayed on the Scheduling sheet to assist you in assigning calls or tasks to your people.

Scheduling outputs include a Doctor Calendar and a Call Calendar that display assignments each day for 53 weeks. These calendars can be printed and/or e-mailed to your doctors and/or call locations. Also, a file is created that can be imported into the Outlook Calendar and then to various mobile devices so the call assignments will always be available to the doctors.

Several cells have comments assigned to them as indicated by the small triangle in the top right corner of the cell. If you hold your cursor over the cell, the comment will be revealed.

## **II. INPUT SHEET**

The schedule start date is input in the cell provided at the top of the sheet. The date is formatted to show the day of the week along with the date but you can enter just the date, and not the weekday. Doctors and calls are listed in the tables. You need to specify the number of people that need to be assigned to each call or task each day of the week. You also need to specify the calls or tasks each doctor may be assigned. Only those calls or tasks will be provided on the drop-down assignment menus on the Scheduling sheet. Each call or task also needs to have an abbreviation that is used to make assignments on the Scheduling sheet. The abbreviations should be limited to 3 characters so they will be completely visible in the drop-down scheduling menus. If you want to use more than 3 characters in the abbreviation, you will need to widen the columns on the Scheduling sheet.

You can also include such things as vacations, days off and other things that you want to be able to assign to the doctors. If you do not specify the number of people needed for each of these special assignments each day the scheduling sheet will not indicate a specific need for the assignment.

The location of a doctors name in the table on the Input sheet affects the location of the doctors name on the Scheduling sheet and on the E-Mail sheet. If you change the order of the names on the Input sheet after calls or tasks have been assigned on the Scheduling sheet, the calls assigned to some or all of the doctors will be incorrect and the e-mail address will be incorrect.

A table is included for you to list up to 40 holidays (or days near holidays) or other special days that you want to track when assigning calls or tasks.

## **III. SCHEDULING SHEET**

Calls and tasks are assigned on this sheet via drop-down menus of qualified doctors. Call and task requirements are listed on the left side of the sheet and the number of doctors remaining to be assigned to each call or task each day is displayed in a green cell. If you assign more doctors than required on a specific day, the number of excess doctors will be shown (as a negative number) in a pink-colored cell. You can assign excess doctors if you want and they will be included in the various output calendars.

At the top of the sheet, above the doctors names, is a tabulation of the calls and tasks assigned to each doctor. The cells in the table are colored green if the doctor is not qualified for the specific call or task. On the left is a table where you can specify what days you want included in the call and task count table. For example, if you want to compare the number of weekend calls assigned to each person, you should check the Saturday and Sunday boxes and the calls for only those days will be displayed.

You can highlight all occurrences of a call or task in the scheduling table by selecting it in the box just above the "Day" column header. The call or task selected will be highlighted in a pink cell in the scheduling table. If you do not want any cells highlighted, you should select "None" from the menu.

Weekends are highlighted in gray rows and holidays are highlighted in pale blue rows.

#### **IV. DOCTOR 1 MONTH CALENDAR**

A 1 month calendar is displayed on this sheet showing the doctor assigned to each call each day. Simply select the month of interest and the calendar will be displayed. You can also select a doctor's name to be highlighted on the calendar so you can easily find the calls assigned to that doctor.

The calendar shows only 1 doctor per call. If you have assigned more than 1 doctor to a daily call, you will need to look at the 53 week Call Calendar to find everyone assigned to the call.

Macro buttons are provided to hide and unhide unused calendar rows. You should re-run the "Hide Unused Rows" macro if you add or delete a daily call on the Input sheet.

You can send this calendar to some or all of your doctors by clicking on the macro button at the top of the sheet. The macro cycles through all of the doctors for whom you have chosen to send the calendar (on the E-Mail sheet) and sends a calendar to them with their name highlighted.

#### **V. CALL 1 MONTH CALENDAR**

A 1 month calendar is displayed on this sheet showing the doctors assigned to the selected call each day. Simply select the month of interest and the calendar will be displayed. The call to be displayed is the one that you have selected on the Call Calendar sheet.

Macro buttons are provided to hide and unhide unused calendar rows. You should re-run the "Hide Unused Rows" macro if you add or delete a daily call on the Input sheet.

You can send this calendar to some or all of the call locations by clicking on the macro button at the top of the sheet. The macro cycles through all of the locations for whom you have chosen to send the calendar (on the E-Mail sheet) and sends a calendar to them.

#### **VI. DOCTORS CALENDAR**

Select a doctors name from the drop-down menu at the top of the sheet and the calls and tasks assigned to the doctor will be displayed each day for 53 weeks. The calendar can be printed and distributed or it can be sent by e-mail.

#### **VII. CALL CALENDAR**

Select a call or task name from the drop-down menu at the top of the sheet and the doctors assigned to the call or task will be displayed each day for 53 weeks. The calendar can be printed and distributed or it can be sent by e-mail.

When you click on the "Click Here to Set up the Calendar" button at the top of the sheet, unused calendar rows will be hidden.

## **VIII. E-MAIL AND E-CALENDARS**

The E-Mail sheet has two tables for you to input the e-mail addresses of people you want to send the 2 calendars. Check boxes are provided for you to specify the calendar recipients. A macro button is provided on each calendar sheet for you to use when you are ready to send the calendars.

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>

The three E-Calendar sheets contains the scheduling information from the three calendar sheets and will be sent to your recipients as a single sheet Excel workbook. 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>

Since these are simple 1 sheet spreadsheets other spreadsheet software should be able to read them.

## **IX. VCALENDAR SHEET**

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. Select the doctor for the file and click the "**Create the vCalendar Now**" macro button to create the file for that doctor. 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. The vCalendar file includes all call and task assignments for that doctor. 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.

## **X. 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.

**Warning:** If you import a file into Outlook more than once, the Outlook Calendar will display the calls more than once each day. So, if you import a file with January calls and then later import a file with January and February calls, the Outlook Calendar will display each January call twice.

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 logic will remove commas from the doctors names but not from the call and task names, so be sure that your call and task names don't include commas.

## **XI. PASSWORD PROTECTED SHEETS**

All of the sheets have protected cells (cells that you may not use to input data). Each worksheet is protected to prevent you from overwriting the information in the protected cells. We advise that you leave the worksheets protected unless you want to make changes on a worksheet that can not be made if the sheet is protected. For example, if you want to hide or unhide rows and columns or change cell colors you will need to unprotect the sheet (Tools, Protection, Unprotect Sheet). Be sure that you do not change the contents of the protected cells containing formulas. You can, however, change the color, formatting, etc of the protected cells. After you have made the changes, be sure to protect the sheet (Tools, Protection, Protect Sheet). No password has been assigned to the sheet protection. You may wish to add a password (part of the Tools, Protection, Protect Sheet series).

## **XII. 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 names of any of the output calendar sheets** for it will prevent some of the macros from executing properly.

## **XIII. TECHNICAL SUPPORT**

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

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