

# S16-Shifts & Tasks - Instructions

## Shift and Task Calendar for 50 Employees

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### 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**n**h**ide, and then select the sheet from the menu.

## **I. INTRODUCTION**

### **Please Read the License on the License Sheet**

This spreadsheet can be used to assign 50 people in 25 groups to 50 shifts and/or tasks each day for a month. Up to 25 shift/tasks can be assigned each day. Each person can be assigned to up to 10 groups and to up to 10 daily shifts and/or tasks. The scheduling sheet is in the form of a calendar. Each day on the calendar you specify the, group and shift/task needs and then you assign people to meet these needs.

Schedule output is on two calendar sheets; one showing the assignments for the selected employee and the other showing the assignments to the selected shift/task.

Some cells have a comment associated with them as indicated by a small red triangle in the upper right corner of the cell. If you hold the cursor over the cell, the comment will appear.

## **II. INPUT SHEET**

The "**Schedule Start Date**" is input in the light-green cell at the top of the sheet. The start date needs to be the first day of the month, and if you input something else, the program will change the date to the first day of the month. The date can be input in any date format such as 3/1/06, but is displayed as month, day, year.

This sheet has two tables where you can list your "Groups" and "Shift/Tasks". These are the items that you can use on the "Scheduling" sheet to define your daily needs. There are "Sort" buttons above the two tables. Click the button if you wish to alphabetically sort the table.

The Group Table can hold 25 "groups". You can also use this table to list employee qualifications instead of groups if that is more appropriate for your scheduling situation. You do not need to list groups or assign them to people on the Employee sheet if you don't need this feature. The "Group/Qualifications" table has a place for the group abbreviation. The abbreviations should be short (1 to 2 characters max) because they will be combined with your employee names on the Scheduling sheet.

The Task/Shift Table can hold 50 tasks or shifts. Each one can be assigned a start and stop time (if appropriate). Times are optional and not required. Some can be assigned times and times for others can be left blank. If the time is left blank, it will be reported on the vCalendar sheet as occurring at 12:00 AM. The "Hours" column is calculated based on the start and stop times.

## **III. EMPLOYEES SHEET**

The "Employee Table" is where you input your employee names and e-mail addresses and assign them to "groups" or "qualifications". The "group/qualifications" columns can be left blank if you don't need this feature. The "group" can be assigned from the drop-down menu, typed in the cell, or copied from one cell to another. If you assign someone to a group, the group abbreviations will appear after the employee name in the drop-down menus on the scheduling sheet. You can assign each person to up to 10 different groups or qualifications.

Employee "groups" can be such things as managers, staff, clerical, engineers, etc. while "qualifications" can be types of equipment or vehicles, etc. the person is qualified to use or operate.

Up to ten vacation periods can be input in the "Employee Vacation Table" for each employee. If someone is shown to be on vacation in this table, they will be unavailable during vacation days in the drop-down menus for task assignments on the Scheduling sheet.

A "Sort" macro button is provided above Employee Name column in the "Employee Availability Table". If you want to alphabetically sort this table, you should use the macro to be sure that the correct columns are included in the sort.

#### **IV. SCHEDULING SHEET**

The Scheduling sheet is in the form of a calendar with each day divided into 3 columns where you specify the "Task/Shift" and "Group" needed each day and then assign someone to fill that need. Each day has 25 rows where you can define and fill up to 25 assignments using the drop-down menus in each cell. The daily employee assignments are made in the "Person" column. The drop-down menu is unique for each day because the menus contain only the names of people who are available on that day.

The "Person" column drop-down menus include both the person's name and the groups or qualifications associated with the employee (separated by a slash [/]). You need to assign people from the proper group or with the proper qualifications to each task. **The spreadsheet logic does not prevent you from assigning an unqualified person to a task.**

At the top of the scheduling calendar are three "Hide" and "Unhide" macro buttons. The "Unhide" macro will reveal all of the scheduling rows for the week. If you don't need that many rows for your scheduling, you can hide the extra rows by clicking on one of the "Hide" buttons. When you click the "Hide" buttons, the selected rows for all of the weeks will be hidden. If you have made assignments on the hidden rows, they will still be counted and will appear on the two output calendars and on the vCalendar file. The thin color-coded column on the left side of the calendar indicates the rows in each block that will be hidden.

You can assign someone to as many task/shifts as you want each day but only ten assignments are shown for each person on the Employee Calendar sheet. If someone has more than one assignment per day, all of the assignments for that person for that day will be highlighted in **bright green colored cells** to make you aware of the multiple daily assignments.

At the top of the Scheduling sheet is a box where you can select an employee to be highlighted. When you select someone from the drop-down menu, all occurrences of that person's name on the calendar will be highlighted in **tan-colored cells**. This will help you see at a glance the assignments for the selected person.

Also at the top of the Scheduling sheet is a macro button that you can click to erase all of the specified daily needs and assignments for the whole month in preparation for scheduling another month. If your staffing needs are relatively constant from one month to the next, you can leave the Task/Shifts and Group columns and delete just the people assigned to them by clicking the "Erase Just The Assignments" macro button. You can also erase tasks and assignments by highlighting them and pressing the "Del" key.

Another scheduling option is to simply change the schedule start date on the Input sheet and adjust your staffing needs and assignments as necessary. Any left-over assignments in the grayed-out days will be ignored so you do not need to delete them if you don't want to. If you use this approach, it is possible that someone who was not on vacation last month will be on vacation this month. To help you find these situations, if a person on vacation has been assigned to a shift or task, his name will be highlighted in a **gray-colored cell**. You need to simply find the grey cells and change the person assigned to the task/shift. The vacation "problem" can also occur if you fill-in a vacation date on the Employees sheet after you have made assignments on the Scheduling sheet. The gray-colored cells will also help you locate and correct this situation.

If the columns on the scheduling calendar are too narrow or too wide, you can adjust them by placing your cursor in the column and selecting Format, Column, Width on the Standard Excel Toolbar and then typing a number in the box provided.

Another option to allow more information in a cell is to format the cell to allow the text to wrap around to another row. This will automatically adjust the row height so all of the text will be displayed in the cell. If you would like to do this, select all of the cells you want to format in this manner and select Format, Cells, Wrap text from the Standard Excel Toolbar. You can also adjust the font size to allow more information to be displayed. You can do this by selecting Format, Cells, Font from the Standard Excel Toolbar and then selecting the font properties you want to apply to the cell.

## **V. SHIFT & TASK CALENDAR**

Daily assignments for a single shift/task are displayed on the Shift & Task Calendar. Select the task you want to display from the drop down menu at the top of the sheet and the calendar will display up to 10 people assigned to that task.

The print range is set to display all 6 calendar weeks. You may want to adjust the print range if you need to display only 4 or 5 weeks. The print footer (at the bottom of the sheet) is set to display the date that the calendar was printed. This feature is useful if you need to print the calendar more than once per month to reflect new and changed assignments.

If you would like to adjust the calendar columns or other properties to allow more information to be displayed, you can use the same techniques discussed in the Scheduling Sheet section.

## **VI. EMPLOYEE CALENDAR**

All of the daily assignments for the month are shown on this calendar for a single employee who is selected from the drop-down menu at the top of the sheet. Up to 10 daily task assignments can be displayed for each employee.

These calendars can be printed and distributed to your employees so they will know their assignments for the month. The print range is set to display all 6 calendar weeks. You may want to adjust the print range if you need to display only 4 or 5 weeks. The print footer (at the bottom of the sheet) is set to display the date that the calendar was printed. This feature is useful if you need to print the calendar more than once per month to reflect new and changed assignments.

If you would like to adjust the calendar columns or other properties to allow more information to be displayed, you can use the same techniques discussed in the Scheduling Sheet section.

## **VII. E-MAIL AND E CALENDAR**

The Employee Calendar sheet can be sent by e-mail to selected employees. Input the e-mail address of your employees on the Employees sheet and select the recipients on the E-Mail sheet and then click on the "send" button on the Employee Calendar sheet. Be sure to select employees to receive the calendar by clicking on the individual check boxes, or you can choose the "Send to Everyone" option.

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 ECalendar sheet contains the scheduling information on the Employee Calendar sheet 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>

## **VIII. 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. The file includes a "SUMMARY" field that shows the employee's name and his group or qualifications (as specified on the Scheduling Sheet), a "LOCATION" field that shows his "Shift/Task" and a "CATEGORIES" field that displays the word "Shift". When you click the "Create the vCalendar Now" button, the macro will save the scheduling spreadsheet under its 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 hidden vCal Out sheet is used in the creation of the vCalendar file and should not be deleted.

If no times are associated with a task/shift, Outlook will display the task/shift time as 12:00 AM.

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 "Yes", the new file will replace the old file. 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.

## **IX. 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 without causing problems in the .vcs file.

## **X. 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.

## **XI. TECHNICAL SUPPORT**

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

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