S15-Shifts for 2 Weeks - Instructions

S15-Shifts-25 Spreadsheet to Assign Daily Shifts to 50 People for 2 Weeks

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**o**rmat, S**h**eet, **H**ide. To unhide a sheet, select F**o**rmat, S**h**eet, Un**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 schedule 50 people, in 9 different groups, for two weeks by simply assigning shifts to each person from a drop-down menu.

Employee vacations and other scheduled absences can be specified and the scheduling logic will keep you from assigning shifts to someone while he or she is on vacation.

You specify staffing needs for each group for each day of the week on the Shift Needs sheet and then assign people to shifts on the Scheduling sheet.

All data entry are made in the light green cells. Other cells are protected and may contain formulas and should not be disturbed. When you first open the spreadsheet, you will see that it contains example scheduling activities for illustration. When you are ready to prepare your schedule, delete the contents of the light green cells and the spreadsheet will be ready to use for your schedule.

II. Shifts Sheet

Tables are provided on this sheet for you to specify your shifts and the number of people you need for each shift each day of the week. Each shift needs to have a unique name and is associated with a particular group of employees. At the top is a small table where you can give names to your groups. This table also shows the supply and demand for people in each group (Avail & Need) as well as staffing surplus and deficit (Over/Under) in both hours and %. The available hours are calculated from the information on the Employees Sheet and the needed hours are based on the staffing needs you input in the tables on this sheet.

III. Employees Sheet

There are two tables on this sheet. The table on the left is where you enter employee names, a short name for use on the calendar, and FTE status along with an e-mail address where they would like to receive their schedules. You also need to assign them to a group and can make short notes about their scheduling preferences. The "FTE Hours" box at the top of the sheet is where you input the number of hours your full time employees work each week. You will be notified by a message above the Name column if you have input duplicate names. And, if you forget to input an employee's initials, the program will use the first 5 letters of the person's name.

The second table is where you can specify up to 10 vacation periods for each employee. If someone is assigned to a vacation, you will be unable to assign a shift that starts on a vacation day to that person on the Scheduling Sheet. It is possible to assign a shift that ends on a vacation day, so be careful with assigning overnight shifts close to a vacation day.

Two sort macros are provided; one to sort by group and employee name and the other to sort by employee name. These macros also sort the employee names and assignments on the Scheduling Sheet.

IV. Scheduling Sheet

You assign shifts to your people from drop-down menus of available shifts each day for up to 2 weeks. Initially each menu is "loaded" with all of the shifts that you defined for the group on the Shifts Sheet. The menus show only shifts associated with the group assigned to the employee. For example, if someone is in Group "B", only Group "B" shifts will be in the drop-down menus for that person. Also, if you need more than 1 person assigned to a shift (per your Daily Shift Staffing Needs on the Shifts Sheet), the shift name will appear on the drop-down menus as many times as you need the shift filled each day. So, if you need 3 "Shift A" on Monday for Group C, "Shift A" will initially appear 3 times on the Monday drop-down menus for people in Group C.

Vacation days are indicated by gray-colored cells. Any shift assignments in these gray-colored cells will not be counted by the program.

As you assign shifts, they are removed from the drop-down menus and after all of the shifts have been assigned, the menu will be empty and the tan-colored cell at the top of the column will disappear. If the spreadsheet is set to calculate manually, or you make successive shift assignments before a calculation cycle is finished, the drop-down menus will not be updated after each assignment and it is possible for you to assign too many shifts. If this happens, the extra shifts will be listed at the top of the column.

The drop-down menus have a "Day Off" shift that you can assign to anyone at any time. If, for example, you rotate weekends off, you can assign a "Days Off" shift to selected people before you begin your shift assignments. A "Day Off" shift assignment is treated by the program as a blank in the Scheduling sheet and shows up as a blank (not the words "Day Off") on all of the schedules and calendars.

Each employee has two "Hours To Go" columns that show the number of hours that need to be assigned to that person in Week 1 and Week 2 to make their target number of hours. If you assign someone too many hours and the "Hours To Go" is negative, the cell will turn rose-colored. Likewise, if hours still need to be assigned for the week, the cell will be turquoise-colored. If no more hours are needed, the cell will be aqua-colored.

V. Hours Sheet

The table on this sheet shows the number of hours you have assigned to each person each week. Also included on the table are the target hours, target FTE and actual FTE for each person. The hours and FTE are color-coded to show hours in excess of the target FTE in rose-colored cells and hours less than the target FTE in turquoise.

VI. Team Schedule

The Team Schedule is simply the results from the Scheduling Sheet in a printer-friendly format.

VII. Individual Schedules

Schedules for each employee are shown on this sheet. The print range is set for all of the schedules and is setup to print one schedule per sheet of paper. You may want to change the print range to include only the number of people you are scheduling.

VIII. Calendar

The calendar shows the employee names [and group] along with the shift start and stop times each day for one week. Select the week to be displayed on the calendar from the drop-down menu at the top of the sheet. You have the option of showing the employee's group on the calendar and the option to keep employees on the same row from one day to the next to help them locate their assignments.

When you click the macro button at the top of this sheet, the ECalendar sheet will be sent via e-mail to your employees. Insert your employees e-mail address next to their name on the Employees sheet if you want them to be eligible to receive the calendar. You may also insert other recipient e-mail addresses in the table if there is room. An employee name does not need to be present for the non-employee to receive the e-mail. Be sure to select employees to receive the calendar by clicking on the individual check boxes on the E-Mail sheet, or you can choose the "Send to Everyone" option.

The ECalendar sheet contains the scheduling information on the 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 form Microsoft at:

http://www.microsoft.com/downloads/details.aspx?FamilyID=c8378bf4-996c-4569-b547-75edbd03aaf0&displaylang=EN

IX. 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 the shift name. A one week schedule for all employees is created on the vCalendar sheet and is saved in the vCalendar file. Simply select the week and click the "Create vCalendar File" 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 14 day schedule for a single employee is created on the vCalendar2 sheet. Select the employee name from the drop-down menu and click on the macro button to create the single employee schedule.

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.

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.

XI. Password Protected Sheets

All of the sheets have protected cells (cells that you may not use to input data). All of the unprotected cells for use in storing data are light green in color. 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 (non-light green) cells. 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

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.

Also, do not move cells from one location to another for it may corrupt the spreadsheet. You may be able to get away with moving (cut and paste) some cells, but if you do it with other cells, it can affect the spreadsheet logic.

If cells with input data are hidden (the light green cells), any data contained in those cells will still be used by the spreadsheet.

XIII. Technical Support

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

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