Scheduling Employees 2000

Scheduling Employees 2000 is widely used in restaurants and other businesses. The application is designed for managers to schedule personnel resources while monitoring the time and wages as the scheduling process progresses. Daily activities may be detailed by assigning Daytypes.
If your operation is 24 hours a day you may have a cutoff that is not at midnight. Starting with this version, you can specify the hours between which you wish to accumulate totals.
A graph will display the time and wage distribution for a 24 hour period for each hour and the number of employees scheduled for every 15 Minutes. You may specify the hours to use for scheduling and statistical totals.

The scheduling function needs a Department with Employees to begin scheduling. Schedules can be created, viewed and edited in one week increments.

The program itself is divided into two parts:

1. The Opening Screen- contains functions related to the program, Departments and Employees.
2. The Main Editor- contains the scheduling commands and schedule printing functions.

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The Graph will show the Employee, time and currency distribution for a 24 Hour period, with the option to print these statistics.

When updating the program with newer versions, your database with Employees and Schedules will be safe (although a backup is always encouraged before making any changes to the program).

Equipment needed

You will need:

- An IBM or compatible PC
- One fixed (hard) disk.
- Microsoft Windows/95 second edition or later.
- A mouse or pointing device must be attached.
- A Super VGA Monitor or higher display.
- A WINDOWS compatible printer, to print reports and schedules.

Program License Agreement

"Single registration".

A single registration allows one install on one system or workstation.
Exception: If you have this program installed at work and take the database home to do scheduling, only a single registration is needed.

"Site license".

A site license covers a single organization in one mailing address (building complex). If you buy a site license, you may use the program in an unlimited number of your company's computers within this area. Site license is very cost-effective if you have more then two computers. Any external installs need an additional single registration.

Conditional use

Read the following terms and conditions before using the program. By using or accepting this program, you indicate that you accept the terms and conditions set forth below.
Guia International Corp. provides this program and licenses its use. You assume responsibility for the selection of these programs to achieve your intended results, and for the installation, use and results obtained from the programs.

Limited warranty
The programs are provided without warranty expressed or implied, including but not limited to the implied warranties of merchantability and fitness for a particular purpose. In no event, will Guia International Corp. be liable to you for any damages, including any lost profits, lost savings or other lost incidental or consequential damages arising out of the use or inability to use such programs even if Guia International Corp. or any of its agents or dealers had been advised of the possibility of such damages. You acknowledge that you have read this agreement, understand it and agree to be bound by its terms and conditions.

Getting Started

When you first install Scheduling Employees 2000, you will see a pre-installed "Example Department," designed to help you explore and become familiar with the features of the program. Feel free to alter the schedules or make changes to the Department Settings until you are comfortable creating your first Department.

To start scheduling your employees, you need to create a new Department and enter Employees to schedule within that Department:

Use menu item "Departments", then select "Add new Department" from the drop down menu and set your preferences, including adding the name of the new Department.

After saving the Department information, select "Employees" to add new employees to the new department. *In order to start scheduling immediately, the only necessary field is 'Last name'*
When you click on the "Schedule employees" button, the Editor will appear ready for you to start scheduling. (See Scheduling Employees)

If you wish to clear the Example department, you may do so by first selecting the Example Department from the opening screen. Then, select "Departments," and from the dropdown menu, "Delete Example Department."

Since features like "First day of the week" and "Week of the year" are set for each Department, showing multiple Departments will assume the setting in the "Current Department" on the first screen.

About Dates

Dates entered in the Employee record conform to the International Setting in the Windows Control Panel. We'll use the example April 2, 2007:

· Year = 07 or 2007
· Date April 2, 2007 can be entered in any of these formats: 2 Apr 07, 2-Apr-07, Apr 2, 2007.

If the year is omitted, the current system year is inserted.
If the international setting is MM-DD-YYYY then 4-2-YY or 4-2-YYYY will do the same.
If there is an error in the date format, a message will alert you.
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Days of the week and Month of the Year are shown in their current regional language settings.

Employee

By selecting Employees on the menu, you can....

- Add and Change Employee information.
- Delete an Employee.
- Transfer Employees between Departments, or check for Interdepartmental Conflicts (if you have more than one Department).
- Print selected Employee information.
- Show upcoming Birthday and Anniversaries

Some other functions from the Employees Menu:

Active and Inactive employees

Sometimes employees do not work for an extended period of time, but are expected to return to work in the future. By marking the Inactive button, the employee will not appear in the editors and schedules but is included in the statistics between dates. If you need statistical information between dates, it is recommended that you mark the employee as Inactive rather than deleting the employee from the database.

Entering employee availability

Mark the time that the employee is **NOT** available for work.

Interdepartmental Schedule Conflicts

For Employees that consistently have dual assignments, (For example, one who is a Cook in the morning and a Cashier in the afternoon), you may consider entering them in each department (Cook and Cashiers) under the same employee number. After you are finished scheduling, you may check for interdepartmental conflicts under the Employees dropdown menu by using their name and employee number. Both schedules will appear, of which you may adjust as necessary.

Note: The "Check Interdepartmental Schedule Conflicts" feature is only available if you have more than one Department installed. If a *Departmental Manager* password is in use, you will not be able to use this feature, because it only allows you to view one department at a time. However, you may still check for interdepartmental conflicts if you use a *General Manager* password. Make sure that shared employees are active and have the same Employee name and Employee ID in each Department they share.

The Main Editor

To become familiar with the application, the Example Department is created with fictitious names for Employees and a Schedule based on the date of installation. The Example Department represents a restaurant with Servers, Cashiers and Cooks. Feel free to navigate through the screens, edit times in the Editor, and sort based on start and stop times (F2 and F3). Currency for Salaried employees is only shown as a total in the individual Editor and Schedule Reports. No adjustments are made for overtime, the currency totals are strictly time scheduled multiplied by the hourly rate. Totals are highlighted with a red background if the totals exceed the overtime settings under "Options".

- All schedules are maintained in memory until saved.
- You can sort the employee listing order from the Menu.
- F2 and F3, will sort employees by Start and Stop time.

To switch from the main Editor to the Employee week Editor, click on the Employee's name on the left of the screen.

Time bar

The Time bar is a thick line representing a start time on the left and a stop time on the right. The color of the Time bar is set in the Employee record. You can have up to 7 Start and Stops each day and up to 34 Starts and Stops each week.

Making a new Time Bar

Start and stop times are entered by pointing the mouse at an editor line, pressing the left button and holding it down while dragging the mouse from left to right or right to left.

Moving a Time Bar

Holding down the left mouse button on any part of the Time Bar *but* the beginning or the end will allow movement of the bar to the left and right. Any conflict or override with the existing bar will be resolved automatically.

If you need to move a Time bar past the end of the current day, for example, to enter time from 11 pm on day one, to 3 am on day two:

- Enter 4 hours in day one (for example, from 6 pm to 10 pm).
- Point the mouse to the first hour and move the beginning of the bar to 11 pm.
- The remaining time will now appear in next day.

Changing the length of a Time Bar

Pointing the mouse to the beginning or the end of a bar will allow stretching or decreasing the bar size while you press down the left mouse button.

Deleting a Time Bar

A double click anywhere on the bar will delete a Time bar. For deleting a line of Time bars, press the right mouse button and select "Cut."

Copying a line of Bars

To copy a Time Bar point at that line, press the right mouse button and select "Copy". Next, point to the line you want to copy to, right click and select “Paste” (This must be a line without bars).

Copying a day of schedules

To copy a day of schedules to another day, go to the target day that has no schedule. Select "Copy" on the menu and select the day you wish to copy.

Copying a week's schedule

To copy an entire week's schedule, select "Schedules" and "Save current week as...” on the menu. When the calendar appears, select any date in the week you wish to save to. The desired week is now ready to be edited and saved. It is best to forward copy only one week of schedules.

Loading a schedule

When the main editor first appears, the schedule for the current week is shown. You may also load a past or future week's schedule by selecting the Schedules menu item “Load week schedule.” A calendar will be shown with the first day of any week marked in red. Select any date within the week you wish to work with. You can change the month and year at the bottom of the calendar.

Setting up a Shift

When you right-click on a Time Bar, you will have the option to save this line as a shift. When doing so, you can save time creating more Time Bars by pointing the mouse at a blank line and right-clicking to load a standard shift. Up to 10 shifts may be stored.

Set Employee's "Days off"

To prevent scheduling on an *entire day* that the employee is not available for work (Vacation days etc.) you are able to mark a calendar.

- In the Main Editor, **right** click on the employee's name.
- In the Employee Week Editor (double click on the Employee name) there is a button on the bottom of the screen marked “Vacation Day” (or whatever name you assigned to “days off” in Department settings).

The calendar for the current year will appear. Mark or unmark the dates you wish to assign and Save. In both Editors where you normally schedule, the area will be colored in Red and it will be impossible to accidentally draw time bars on the dates assigned. *Note:* This is not the same as marking Employee availability (marking certain *times* when the employee is not available), which is accessible through the Employee Record.

Flagging overtime

Under "Options" on the opening screen, you may enter the conditions under which to warn the scheduler that overtime is scheduled.

Assignment column

On the main Editor to the right of the employee name is a multi use column that can be set from the bottom of the screen with options such as Week wages or Daily hours.

Flagging Under-age Employees

Most governments place limitations on the number of hours and the time of day in which employees are allowed to work if they are below a lawful age. Under "Options" on the opening screen, you may set the employee age. In the Employee's Weekly Editor (double click on the Employee name), a warning flag will advise the scheduler if the currently displayed employee is below that age, based on the current system date and the date of birth in the Employee Record.

Navigating in the Editor

To navigate between weeks, you may use of the buttons below the Employee names.
If you wish to see a particular week, click on Load and a calendar will appear from which you can select a date, or you may select “Go To,” and select a date from the calendar.

Password protection

Passwords, once entered, will restrict access to the database that contains Department, Employee and Schedule Information. A password must be between 5 and 12 characters in length.

There are two levels of password access:

- General Manager password
- Department Managers passwords (2)

The first password to enter will set the General Manager's password. The General Manager may enter up to two passwords per Department, and give them to the Department Managers as a temporary password. Optionally, these passwords can be changed by the Department Manager. By entering a Department Manager password, that manager has access to only that department. The General Manager will retain access to all departments. If the General Manager makes his/her password blank, the password function is bypassed until a new password is entered. The General Manager may hide access to Salaries and Wages from one or both Department Managers.

The Department Manager password will restrict your access to one Department only. If you lose your Password, only the General Manager can reinstate your access by assigning you a new one. If you are authorized to change your Password, change it on a regular basis.

Productivity feature

Some businesses are measured on productivity. You may select three options to monitor: Sales, Transactions and Labor %. In a restaurant, Transactions would be Meals and Sales would be the Sales forecast. By clicking on "Productivity" on the bottom of the screen, the daily Transaction and Sales figures may be entered. Wages time and/or Salary time may be included. The Labor % is the ratio of labor cost to Sales.

As the scheduling progresses, the ratios and Labor % will be displayed on the bottom of the screen, by day and by week. When printing the 7 day schedule report (Including HTML), you may elect to show the weekly productivity totals and statistics for each day.

Note 1.... If you elect to include the salaries in the Labor percentage, the daily salaries are calculated as the weekly salary divided by the number of days for which a Sales forecast is in place.
Note 2..... If a password is used that is not authorized to see financial information, the Labor

percentages will not be shown.

Database backup

It is always a good idea to have a backup copy of the database, in case of a crash or if the current data becomes corrupted. If you install to a new system or if you make schedules at home and need to take them to work to print or change, you may also use the Backup and Restore function. The menu is on the opening screen under "File," and “Backup Database.” The latest media to back database files are Flash drives. These modules plug directly into the USB ports, hold a large amount of data and are easy to transport. When you back up your database, give the backup file a relevant name (ex. The current date). The file extension will automatically be added (.BAK). If for some reason your database becomes corrupt, do a "Restore database" and select the backed up file on your Flash drive.

Options

Under Options on the Opening Screen, you may enter the conditions under which to warn the scheduler that overtime is scheduled. The initial settings are set to "Off". When the daily or weekly hours exceed the settings, the background cells in the Editors that display the totals will be colored red.

Select the editor starting hour so the majority of the employee scheduled will be displayed to the screen without having to scroll. This function is overridden when the statistic hours in the department screen are other than from Midnight to Midnight.

· To flag daily hours over 8, set daily at 8 and weekly at 168.
· For weekly hours over 40, set weekly at 40 and daily at 24.
· To flag both daily over 8 and weekly over 40, set daily at 8 and weekly at 40.
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Note: Options on this screen effect all departments.

Printing Employee information

On the Opening Screen, under menu item "Reports", you may print information about the department employees. At your option you may specify the information you want to print by selecting the fields.

Employee statistics between dates

If you have a need to have the accumulated time scheduled between two dates, click "Reports" on the Opening Screen. A preview of the report will show first, with an option to print. Information for Wages and Salaries are shown separate and is broken down by the days of the week.

Week numbers

For our customers in Europe, it is important that weeks in a year have a number. Each week can have a unique number. The question is- where does the first week of a new year begin? Based on the International Organization for Standardization (ISO), a week starts on a Monday and ends with Sunday. The first week of the year starts as soon as 4 days in a week are in the new year.

Scheduling employees 2000 gives you flexibility to set the first day of the week and a criterion for setting the first week of the year. The selection is set under Department Settings. If you do not want to use the feature, you may turn it off. The week numbers are shown on the day of the week label, bottom-right corner.

Department daily memo

A department daily memo can be entered for each day. You may add reminders to any day. There is no limit on the size of the memo. The memo form is opened by clicking on the label next to the day name. If the label is marked in red, the day already has a memo attached to it. On the 7 Day Schedule report you may print these memos as an option at the end of the schedules.

Headcount feature

Some managers are measured on Headcount based on sales per hour. The Headcount feature shows the number of people scheduled between hours, and it is available on the Main Editor, at the top of the screen adjacent the time bar. The feature can be turned on or off. The Headcount number may not be a whole number. The count of .25 means that one employee is scheduled for 15 minutes.

Daytypes

Daytypes are one or two character codes that represent an activity for a day.

Example Daytypes are:

PH for Phone duty
MA for Main store
S for Sick day
BD for Bathroom cleaning Duty

- Do not use Daytypes to schedule vacations, use the "Day off" function.
- These codes are entered to the right of the multi-use column next to the employee name in both Editors. You can select, add, change or delete a Daytype. As an option, they can be shown in the printed schedules.
- If you click on the cell (so the cell is highlighted) you can insert a selected Daytype from menu item "Daytype".
- The character W cannot be used as part of any Daytype.
- The maximum number of Daytypes is 50.

Department

By selecting Departments on the menu, you can:

- Set up a new Department.
- Change the name of the Department
- Delete a Department
- Set the hours that collect statistics for each day.
- Set the first day of the week.

- Set the current Department (If there is more than one).

To do any scheduling, you must have at least one Department with Employees in it.

Employee availability for work

The Employee non-availability is entered with the mouse, the same as in the Editors. From the Opening Screen, select “Employees,” then “Add” or “Change Employee Record”. By clicking and dragging the red bar (the times the Employee is *not* available to work), the Employee’s availability will now be graphically visible on demand in the Editors by clicking on “Availability” at the bottom of the Editor screens.

Time and Wages Graph

By clicking on the Line graph button in the Editor, the Time and Wages distribution will be shown.

This graph will show the "Headcount" for each 15 minute period during the day, as well as the total wages for each hour. Initially, all assignments will be displayed. By clicking on assignment, the graph will show more detail. Each 15 minute period is represented with a graph line. The first quarter of each hour is represented by a red line, the second quarter by a white line, the third quarter by a blue line, the fourth quarter of by a yellow line.

Salaried Employees are excluded from any currency calculations- only hourly Employees are reflected in the currency totals. Time includes all Employees. To identify peaks and valleys, click on Show white. A report with 15 Minute statistics and the hourly Headcount will print when you click on Print or Print preview.

Bar chart

The Bar chart displays the 24 hour period starting with the current day. You can selectively show the start and stop times by multiple assignments.

The Bar chart may be printed from the Main Editor under menu item Print schedules. You also have the option to print the Bar chart for the entire week and sort each day by start or stop time before printing. Unless specified, the report will print as many days as possible on each sheet, saving paper.

Employee's Birthdays and Anniversaries

You can list upcoming Birthday and Anniversaries of Employees for a specified number of days. For this option to work, the Employee hiring date and date of birth must be filled in.
Select "Employees" and "Birthdays and Anniversaries" on the Menu from the Opening Screen.

Print schedules

The printed schedule has work start and stop times between midnight and midnight 24 hours later. If requested, totals reflect the totals between the 24 hour period that you selected in the Department screen. All reports have a "Print Preview" option. You can adjust font, font size, orientation etc. By right and left clicking the mouse button, the image will be shown larger and smaller.

From the bottom menu, you can also preview each page. The smaller the font size, the more names will print on a single page. The print-order is the same as the schedule displayed on the screen. As an option you may print Time and or Currency totals as part of the output.

With the exception of the Bar Chart report, daily times and currencies are for shifts and include any time and wages past midnight. The Bar Chart report time is for the 24 hour period shown.

The daily totals for some Employees may be off slightly if partial hours are worked, causing rounding errors. Time and currency totals do not include any break times that were set up in the Editor. No adjustments are made for Overtime, the currency totals are strictly hours scheduled multiplied by the hourly rate.

Some businesses want the last stop time flexible and have the option to dismiss employees earlier or later then the planned schedule. Before printing, "The last stop time of the day" will allow you to print the text to replace the last stop time for each day.

Note: From the Opening Screen, you can print a seven day schedule when a selected department is included. If a Password is used, only the "General Manager" will have access to that report. Since different departments may have their own options such as first day of the week, options settings from the current department are used.

HTML files

HTML files are files that you can publish on the Internet. For reports that can be exported to HTML (.HTM) files, the "HTML Review" and "HTML Save" buttons will be shown. In the translation to HTML files, some formatting is changed but what you saved as an HTML file is fairly close to what the HTML preview shows.

Setting up a Network

The database (Sew.mdb) that contains Department, Employees and Scheduling information is by default in the same folder as the program and transparent to the user.
With more systems connected to networks however you can access the (Sew.mdb) database on a server in a remote location.

The database (Sew.mdb) must be in a folder, not in a Root Directory.

Select "File" and "Network path" on the Opening Screen.
Select the alternate path to the database. If the path is valid the path will show in green.
If you do not want the user on this system to have access to the database for Backup, Restore etc. you can make the menu choices unavailable. The database path will show on the Network Path screen. You can set the workstation authorization to restrict scheduling and to hide salaries and pages. Password authorization overrides restriction set up for the Network.

Sometimes, you may have many workstations making inquiries to the database as "Read only". In that case most customers will have a "Mirror" database (sew.mdb) in a separate folder on the server and restrict the workstations from making changes to schedules.

Important note: If you mark "Make path or authorization changes", you must delete file "NetworkPath.Dat" to make Network options available as choices again.

Frequently Asked Questions

Q - What do I need to start scheduling the employees in my department?
A – At the very least, you need to enter the Employee's last name in the Employee Record in order to start scheduling.

Q - My work week starts on a Monday, the Editor now show Sunday, how can I change it?
A - On the opening screen, select "Departments" and "Change Department settings".
Set the new first day of the week and save.

Q - I run a 24 hour business and my cutoff is at 3am, can I get my totals and Editor hours to reflect that?
A - On the opening screen, select "Departments" and "Change Department settings".
You can now select your cutoff hour between midnight and 8 am.

Q - I finished last week's schedule. This week, the schedule is almost the same. How can I copy the entire week and just make changes.
A - In the Editor, show the week you wish to copy.
On the menu, select "Schedules" then "Save current week as…"
The calendar will now show.
Click on any day in this week and the Editor will show the current week ready for the changes.

Q - Can I copy just one day? I just finished the schedule for Tuesday. The next day Wednesday is almost the same with some minor changes.
A - To copy Tuesday into Wednesday, click Wednesday in the Editor.
To copy to Wednesday, Wednesday cannot have any schedules in it.
Now click on menu item "Copy" and select "Tuesday".

Q - Sometimes I want to do the scheduling at home, not at work.
A - In order to take your current schedules to another location, you need to take the database there. The database contains all the departments, employees and schedules. The database file name is "SEW.MDB".
On the opening screen, select "File" on the menu and click "Backup database". Give the file a relevant name. The file extension will automatically be ".BAK". Save the file to a Flash drive in your USB port and take it home. When home, do a "Restore database" and browse for the file you named in the Flash drive. You will be asked to overwrite the current database, answer "Yes" and re-start the program. Employees and schedules are now the same as the ones at home.

Q - I have three Departments. Some Employees are shared by all the Departments. How can I check to make sure these Employees are not assigned to one or more locations at the same time since the Main Editor shows only one Department at a time?
A - Interdepartmental Schedule Conflicts can be viewed by selecting "Employee" and "Check Interdepartmental Schedule Conflicts". A limited function of the Main Editor will show you the Employee's schedule for all the Departments in which the Employee was entered. You can make any schedule adjustments needed. Note: The employee ID must match in each department.

Q - Employees are requesting days off, sometimes months ahead.
A - In the Main Editor, right click on the employee name, in the Week Editor, click on the button. On the year calendar, select or de-select the days off requested and save.
In both Editors, those days will now be marked in red and you are blocked from doing any scheduling.

Q - We do not call our people Employees can I change the word Employees?

A - In the Department screen, change the name "Employee" to Associate or any other name.

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