Scheduling Employees for Windows Version 5.07
A tool for Managers

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Introduction

Guia International offers two Employee schedulers;

o - **This program**, "Scheduling Employees for Windows", was developed for those institutions that have mostly part-time help and keep an eye on the bottom line, time and labor cost as they schedule. Scheduling is done by dragging the mouse to enter working start and stop times. **The editors of PC Magazine awarded this program the "Business shareware of the year award for 1995".**

o - "Employee Scheduling Assistant for Windows" is designed for businesses that have for the most part full-time employees and want to do shift assignment, keeping track of vacations, sick days etc. A shift rotation template allows easy assignments of shifts.
A window for each day and for each employee, may contain appointments comments and other information. Schedules are for three years, and may start on any month or a business year.   One Employee's scheduled for one year and a Department's for one Month may be viewed on a single screen.

This program "Scheduling Employees for Windows" 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 "Day Types". Day Types are a single characters such as V= Vacation. Ten Day Types may be specified for the use in each Department.

A graph will display the time and wage distribution for a 24 hours period for each hour and the number of employees scheduled for every 15 Minutes.

The scheduling function needs a Department with Employees to begin scheduling. Schedules are for a one week period. You may schedule up to 150 Employees in each of up to 99 Departments.

To make the application more "User friendly", the user will not have to deal with Directories and SubDirectories. If details of a technical nature are needed, see the section entitled "Technical information".

The application is divided in two parts:

1 - The opening screen. It contains functions related to the application, Departments and Employees.

2 - The Editors perform the scheduling and schedule printing functions.

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

Equipment needed

You will need;

o - An IBM or compatible PC (286 or higher)
o - A combination of at least one diskette drive and one fixed(hard) disk.
o - Microsoft Windows 3.1 or later.
o - A mouse or pointing device must be attached.
o - A VGA Monitor.
o - A printer to print reports and schedules, a laser printer is preferred.

Mouse Tracking

Since almost all functions are directed through mouse action, it is a good idea to slow the pointer movement on the screen.

To slow down the Mouse Tracking:

o - From the Window Program Manager, select the Control Panel.
o - Click on Mouse.
o - Move the Mouse tracking speed towards Slow.
o - Move the mouse and see if the move feels comfortable.
o - Click on Ok to save the setting.

Installation

Insert the program diskette in Drive A: or B:
From the Windows Program Manager, select "File", then "Run" and type a:setup or b:setup when asked. All the Programs and files will be installed, you will be prompted for the Disk drive and Directory that you want these files to be located, a default path is offered.

Using the Menus

The Scheduling Employees for Windows, uses drop-down menus. Just point at the heading and press the left mouse button and a further selection can then be made.

The Opening Screen

The purpose of the Opening screen is to;

o - Set up new Departments with Day Types.
o - Enter, change,delete or print Employee records.
o - Print an invoice for registration.
o - Set up options for time format, overtime, registration entry, age limit setting and day
     starting hour for the Editors.
o - Help if needed.
o - Exit the application.

Click on "Schedule employees" to go to the Editor.

The Editors

Entering and changing schedules is performed in the Editors.
There are two Editors;
> o - All Employees for one day
> o - One Employee for one week

To switch from the main Editor to the Employee Editor, click the mouse on the Employee's name on the left of the screen. To become familiar with the application, some files are added during the installation process. These files created the "Example Department" with fictitious names for Employees and a single Schedule-file based on the date of installation.
The Department represents a restaurant with Servers, Cashiers and Cooks. Take a look at the screens, edit times in the Editor, sort based on start and stop times. Note that the Schedule file name is "Year-Month-Day.Weekday" so when you choose a Schedule-file the oldest dates are on top. 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".

Click on "Graph" at the bottom of the screen, and the distribution for that day will be displayed.
By clicking the mouse "Assignments" you can further break this information down and print it.

Edit controls

Note the "Scroll bars" in the Editor, from left to right you may scroll to go from midnight to midnight on the top scroll bar (Scrolling hours) or from day to day on the bottom one (Scrolling days). If you point on the arrows, the increments are one, any other place, on the top bar equals 6 Hours on the bottom bar 3 Days. To quickly go from Midnight to Midnight, two controls on the bottom of the screen can be used. Nineteen Employees will fit on a screen, the vertical scroll bar will only be displayed if you have more than nineteen. To quickly go from to first to the last page, two controls use on the bottom of the screen marked "First page" and "Last page".

Display of totals

Also notice some option button that you can click. The column next to the Employee name will change based on these option buttons. As you progress with the scheduling process, this column will display daily or weekly accumulated totals for time or currency for Employees that have an hourly pay-rate. NOTE!!! The daily time and currency totals displayed, are for that day only, in contrast to the daily totals in the Schedule Report that are the shift totals and include time after midnight if the shift started on the previous day.

The time bar

Time is entered and changed in the Editor screen. The representation of time is the "Time bar".
You may have up to 34 Start and Stops per week for each Employee. Since the accumulated time is displayed as an option, unpaid break-times such as a lunch break should also be entered.
Note: An arrow is displayed under the "Hour-ruler" to show the current mouse position. As you enter time by dragging the mouse, a bar under the ruler will show you the progress. After the bar is completed the bar is adjusted to the nearest 15 minutes. You may choose to color of the bar under "Options" in the Opening screen.

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.

Move a time bar

Pointing to the bar, away from either end and while holding down the left button, will allow movement from left to right. Any conflict or override with existing bar will be resolved automatically.

Changing a time bar

Pointing the mouse to the beginning or the end of a bar will allow stretching or decreasing the bar size.

Deleting a time bar

A quick double click anywhere on the bar will delete the bar. Pointing to the end of a bar and decreasing the bar size to less than 15 minutes, will also delete the bar.

Copy an Employee's day of time bars

By pointing the mouse at an Employees line with time, press the right mouse button and the bars will be copied. At the same time a message will be displayed "Holding time for copy".
While the message is displayed, you can copy this time to any Employee's line that has no time in it by pointing at that line and pressing the right mouse button. You may also go to other days and repeat the process. To copy a new bar, point to the "Holding time for copy" message and click to reset, then pick up the next bar to be copied.

Move a time bar past midnight

Example: To enter time from 11 pm on day one, to 3 am on day two.

Solution: Enter 4 hours in day one 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 day two.

Entering and changing Day Types

Day Types may be changed directly by pointing the mouse and clicking at the box to the left of the edit area and pressing a valid Day Type character. You may also select "DayTypes" from the menu on top. All valid Day Types will be displayed for your selection. Pressing the spacebar deletes a Day Type.

Dual Assignments

For Employees that consistently have dual assignments, (Cook in the morning and Cashiers in the afternoon), you may consider entering them twice, than schedule them after a sort on Employee number to prevent overlapping time schedules.

Copy a Department Day Schedule

After you have completed the schedule for a day, you can copy that schedule to any other day if that day has no scheduled time in it.
       1 - Go to the day to copy to.
       2 - Select Copy from the menu.
       3 - Select the day to copy from.

Repeat a weekly schedule

Many organizations have rotating schedules that repeat themselves every 2, 3 or 4 weeks.
Make up the week one schedule by entering all the time without Day Types like vacations etc.
Save the schedule by selecting "Save as.." from the menu and enter 1-1-11 as the file name. Save week two as 2-2-22. This way, these files are always listed on top of the file choices for selection. After loading the file for a new schedule, make all the changes and add vacations etc. Save the file as the date for that week. Inactive Employees will not be loaded if they are included in a schedule from the past. They will also be filtered out and not saved on the new schedule.

The Time and Wages distribution Graph

By clicking on the "Graph" button in the Editor, the Time and Wages distribution will be shown. Initially, all assignments will be displayed. By entering each assignment, the graph will show more detail. Each 15 Minute period is represented with a graph line. The sequence starting with the first 15 minutes each hour is Red, White, Blue, Black. Salaried Employee are excluded from any currency calculations, only hourly Employees are reflected in the currency totals, time includes all Employees. A report with the 15 Minutes stats will print when you click on "Print".

Flagging under-age Employees

Government places limitations on the number of hours and the time of day that employees are allowed to work if the employee is below a lawful age. Under "Options" on the opening screen, you may set the employee age. In the employee individual Editor, 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.

Productivity feature

Some businesses are measured on productivity. Two items are included, Units and Revenue. In a restaurant. Units would be Meals and Revenue would be sales. By clicking on "Productivity" the daily Units and Revenue figures may be entered. Wages time and/or Salary time may be included. As the scheduling progresses the ratio will be displayed on the bottom of the screen.

Flagging overtime

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 "off". Click on "Help" for details.

Password protection

If you are a registered user, you will have access to the password function. Passwords, once entered will restrict access to the employee and schedule files. There are two levels of password access:

> o - General Manager password
> o - 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. These passwords can then 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 a blank, the password function is bypassed until a new password is entered. The General Manager may hide all Salaries and Wages from one or both Department Managers.

Reports

Two types of report are available, one Employee register that prints the Employee name and other information that is requested, the other is a requested Weekly Schedule to be printed. The Schedules are printed from the Main Editor screen all other printing is done from the Opening screen.

Schedule file names

When a schedule is saved, the name of the file is based on the Week-starting or Week-ending date (Based on option selection). In order to list the file selection in date sequence, the file name is: YY-MM-DD.dayname regardless of the International date settings in the Windows Control panel. So a file named 95-12-1.fri is dated December 1, 1995, which is on a Friday as reflected in the file name extension.

Print Schedules

Tree printing formats are offered. One format will print the schedules vertically with Times and Currencies to the right and a format that shows the Days from left to right. The three formats needs special font considerations, since the text must fit the paper to print on. You may select either Portrait or Landscape from Printer setup before starting the printing process. For most printers, a Courier font Pointsize 8 will be fine. If you select a font that does not fit, you will be advised with a message. If you print to a Matrix printer, select the Courier 17.1 font. That is the font that used to print condensed in DOS. A Character based schedule is offered to save time, especially on Matrix printers, for Laser printers it does not make that much difference. The Graphic based option has a better appearance. The smaller the Font size, the more names will print on a single page! The printer must have enough memory. 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 hours 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 time scheduled, multiplied by the hourly rate. At your option you may direct your printing direct or through the Print Manager in Windows. If you wish to print on another system, connect your printer from the current printing port (like LPT1:) to FILE via the Control Panel and name the file to a floppy, then copy the file to the printer port from the floppy in the new system.

Departments

To decide the Department size, consider:

A Department should include all the Employees that would be the responsibility of a Manager. Employees should consistently be a part of that Managers operating unit.

The Department related activity is located under menu item "Scheduling Employees" on the Opening screen. You may have up to 99 Department, and up to 150 Employees per Department.

Employees

Employees are entered in the Opening screen. While entering or changing an Employee record, use the Tab or Enter key to advance through the Employee screen or hold down the Shift key and press the Tab key for reverse tabbing. Instructions on the bottom will help you entering information. Employees are divided in Active and Inactive Employees. The Editors will only display Active Employees. If you display an old schedule and an Employee on that schedule was deleted or inactive, when you save the schedule, that Employee will not be included in the schedule. Seven lines are reserved to enter the Employee's availability to work. These lines are available in the Editors to help you to schedule. When sorting, the previous sortorder will be preserved, that is not the case when you sort in the Editor.

Hourly and Salaried Employees

The rate of pay option is divided between Hourly wages and Weekly salaries. Salary totals are not related to time worked. Time worked totals include both Hourly and Weekly Employees.

Employee availability for work

The availability for an Employee to work may be filled in when entering a new or changing the current Employee information. This information will be available as you make the schedule.
On the individual Editor it is automatically displayed, on the Department Editor this information can be recalled by clicking the mouse on the total box next to the Employee name.

About Dates

Dates entered in the Employee record, conform to the International setting in the Windows Control Panel. You may enter: 2 apr 95 or: 2-Apr-95 or: apr 2, 1995 or any combination for April 2, 1995. If the year is omitted, the current system year is inserted. If there is an error in the date format, a message will alert you.

To start the program after installation

After installation, you may select the Schedule Employee for Windows Icon from the Program Manager Window, or select "Run" and answer Path\SEW to the file prompt.

Technical information

This application creates Directories for new Departments as needed. The "Example Organization" is installed in Directory SEW1DIR during the install process. Subsequent Directories will be named automatically when new Departments are installed like SEW2DIR, SEW3DIR etc. When a Department is deleted, the Directory will also be deleted and reinstalled as new Department is created. The associated Directory is displayed on the Department Window when "Change Department" is selected from the menu. The files HEADING.DAT, EMPLREST.DAT and Schedule

files (YY-MM-DD.day) in each Directory must always be transferred or backed up together since they contain pointers. In the WINDOWS\SYSTEM Directory, the following files must be present: THREED.VBX, CSCALNDR.VBX, CSTEXT.VBX, CMDIALOG.VBX, VBRUN300.DLL, COMMDLG.DLL QPRO200.DLL.
No files with the extension of .VBX should ever be located in the WINDOW Directory, only in the WINDOWS\SYSTEM Directory.

Registration

The registration fee is $39.50 in US currency. Registrations will be acknowledged by mail within 30 days of receipt and confirms the authorized use of the program. A confidential registration code that may be entered under Options in the opening menu will alter the opening screen so the shareware message will no longer be displayed. The registration code identifies the licensed user and must be protected. Any updates will be included if a copy of the filled out invoice is included for version determination. Agreements known as "Site License Agreements" providing for unlimited usage for one location (by address) are in effect after the registration of three regular registrations (to the amount of $118.50) have been submitted. Many recommendations for new features and also operational improvements come from our users. With your registration, include any remarks you wish, we will look at and evaluate every suggestion made and they are always welcome!

Technical Support

After the registration has been received by Guia International, the User is entitled to free telephone or written support for a period of 90 Days. Any extended support may be negotiated thereafter but shall at minimum be in conformance with the regulations of the Association of Shareware Professionals (ASP). For assistance, call (770)926-6085.

Acknowledgements

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