

Employee Scheduling Assistant for Windows Version 1.09 **A tool for Managers**

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Introduction

Guia International offers two Employee schedulers;

- o - **This program**, "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..
- o - "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 program was awarded the 1995 Business/Finance Shareware of the year award by the editors of PC-Magazine.

This program "Employee Scheduling Assistant for Windows" schedules for a fixed three year period. The computer screen moves across and vertical like a spreadsheet to view and make changes to these three years. The three years may start on the first of any month so that a business year may start on the first day May for the first year and end on the last day of February three years later. Every new business year you may move the window up one year or use the second year as your current business year. For each employee and date you may;

- o - Enter a Daytype, representing a function like Vacation or working time like 12:30am - 7:30pm
- o - Open a message window and leave information in it. Information entered may be a sub-day schedule or comments.

Up to 60 Special event days may be entered across the three year period. Special event days are holidays or other special events. Special event days are marked in the Editors as a green cell. Week-end cell are marked blue.

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

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 three parts:

- 1 - The opening screen. It contains functions related to the application, Departments and Employees.
- 2 - The (Two) 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 (386 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.

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**. 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 Employee Scheduling Assistant for Windows, uses drop-down menus and buttons on the bottom of the screen. Just point to the Menu-bar on top 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.
- o - Enter, change, delete and print Employee records.
- o - Set up options for file designation, time format and the three year start date.
- o - To enter and change Day types.
- o - To set up and change special event days.
- o - To set up Passwords
- 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 a 31 day period.
- o - One Employee for one year.

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 typical department with fictitious employees. Take a look at the screens, make changes, sort and open cells to enter information.

Click on "Show 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 even print it.

Edit controls

Set the cursor to any cell on the screen by pointing the mouse and click with the mouse left button. You may also move the cursor positions with the arrow keys. By pointing at a cell and pressing the right mouse button, you will see the "Day detail" function. If you make an entry and click the mouse on "Save", a red underscore will indicate that that cell contain day detail information. To clear a "Day detail", clear the information and "Save". Twenty two Employees will fit on a screen, the vertical scroll bar will only be displayed if you have more than that. To quickly go from first to the last page, two controls use on the bottom of the screen marked "First page" and "Last page".

Moving around in the Main Editor

Picture the screen to move left and right across a three year period, like a spreadsheet by clicking the screen bottom plus/minus days and months. By clicking in the center, the current month or the first date shown will be the current date.

You may start this three year period on the first of any month. The start month and year is set by changing the department setting. The initial start date is set at 1 January of the current year, but you may change that. After the first year of scheduling has passed, you may elect to make no change in the three year cycle so you can check a schedule of the previous year and still have the option to schedule for the next year.

Vertical scrolling is done by clicking on the vertical scroll bar. This bar is only shown if you have more employees the will fit on the screen.

Entering and changing Daytypes in Editors

By clicking on a cell, you may enter a Daytype at that cursor position. To clear a Daytype, press the spacebar or delete key.

Template

If you have rotating shifts that either repeat themselves every number of weeks, you may use the Template function to enter the Daytypes in the Template, set the date that the cycle start and write it to the Main Editor.

Important!

Daytypes that have already been entered before pasting the Template will NOT be overwritten! If you have vacations etc. scheduled, they will remain. For those shifts that rotate on a multiple week cycle, a message will notify you if weeks are not full weeks. If you have permanent shift assignments, you may set the current shift assignment for up to 99 days ahead. To duplicate lines on the template:

- o - Place the cursor on the line to be duplicated.
- o - Press the right mouse button.
- o - A message will appear that the mouse is holding Daytypes.
- o - Place the cursor to the BLANK line to duplicate to.
- o - Press the right button again.
- o - To reset, click on the message box that holds the mouse message.

When you paste the Template to the Main Editor, you can check the Main Editor it first before

saving it.

The Time and Wages distribution Graph

By clicking on the "Show 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".

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. Any report may be printed and is started by the current screen in use. Print sequences are printed as they appear on the screen.

Print Schedules

Three 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. 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. You may have up to 99 Department, and up to 150 Employees per Department.

Setting up a new Department

To set up a new department, click on "Department" and...

- o - Fill in the department name.
- o - Enter the date that the business year will start. This date must start on the first of any month or year, the default is January 1, of the current year.
- o - Enter the names of the Department Employees, using upper and lower case characters. You may alter or update any information at any time. Click on "Employees" to start.
- o - If you have fixed items that you wish to track for each or some days, fill in the activity column and related unit. (Example, some organizations keep track of Vacation and Sick time by the Hour rather than full or partial days. For each day and each employee you may keep track of this and use summaries to add for totals between dates. Take a look at the "Example Department" to see how this is done).

Set or change year to start

Since the Main Editor covers a three year period, you may decide to change the start date of that three year cycle. This is done by changing the date in the department. Schedules between dates will be lost and you will be advised. If you wish to retain the schedules, print them out for save keeping.

Now we are ready to set up the **Daytypes**, **Special Event** and work Start and Stop times.

Setting up Daytypes

Click the mouse on "Manager", select "DayTypes" and "Add Daytypes".

The object is to keep the Editors as readable as possible with a minimum of clutter causing confusion or distraction. Remember, Daytypes are characters representing daily activities such as V= Vacation, 1= 7am-3pm etc. You may enter work Start and Stop times. At your option, fill in a break like a lunch period. If you are not concerned with working hours and wages, ignore any of the references made to Start/Stop times. At your option, a cell in the Editors may be blank yet represent time worked. It is normally reserved for employees that work a standard day like 9:00 to 5:00 and are off on weekends. Enter the working times and mark the days that the employee is working. The purpose of the Blank Daytype is to minimize the clutter and only enter exceptions in the Editor.

Examples

Example 1:

You are operating an office whose people work Monday through Friday.
Set the Daytypes as follows:

V= Vacation 00:00 00:00 00:00 00:00
S= School 00:00 00:00 00:00 00:00
Etc.

Click the mouse on "Manager", select "Daytypes" and "Blank Daytype".

Set Start/Stop 08:30 12:00 12:45 17:15

The Start and Stop times in the Blank Daytype are the normal work hours including lunch.

Example 2:

You are operating a store that is open from Monday through Saturday, the hours are from 9am to 5pm. Some Employees have the day off during the week to make up for the Saturday worked.

Set up Daytypes as follows:

L= 1pm - 9pm 13:00 21:00 00:00 00:00
O= Off Day 00:00 00:00 00:00 00:00
V= Vacation 00:00 00:00 00:00 00:00
S= School 00:00 00:00 00:00 00:00
Etc.

Blank Daytype 09:00 17:00 00:00 00:00

Mark all the Working days with a "Yes" except Sunday.

The Start and Stop times in the Blank Daytype are the normal work hours, you may add lunch breaks if you wish.

Example 3:

You manage a hospital ward. Nurses work around the clock. The operation is 24 Hrs/Day, seven days a week including Special Event Days.

1= 7am - 3pm 07:00 15:00 00:00 00:00
2= 3pm - 11pm 15:00 23:00 00:00 00:00
3= 11pm - 7am 23:00 07:00 00:00 00:00
V= Vacation 00:00 00:00 00:00 00:00
T= Training 00:00 00:00 00:00 00:00
Etc.
Blank Daytype 00:00 00:00 00:00 00:00

Example 4:

Fire Departments, usually have a 48 hour single assignment. Set the Daytypes as follows:

1= Day 1 13:00 24:00 00:00 00:00
2= Day 2 00:00 24:00 00:00 00:00
3= Day 3 00:00 13:00 00:00 00:00
V= Vacation 00:00 00:00 00:00 00:00
T= Training 00:00 00:00 00:00 00:00
Etc.
Blank Daytype 00:00 00:00 00:00 00:00

Assignments in the Editors should be three consecutive days marked 1 2 3.

Any combination of circumstances may be adopted. The basic rule is that if the Blank Daytype working Start and Stop times are not 00:00, a blank Day Type in both Editors will represent a working day if marked.

Special Event Days

Special Events Days are like special dates that are marked in the Editors as green cells. These dates represent dates like company Holidays or audit days. You may enter a total of 60 of those dates.

Click the mouse on "Manager", select "Special Event Days" and "Add Special Event Day".

Enter the Date, the name of the Event day and whether work would be performed if the Daytype is blank for that employee and the day is marked as a "Working day" in blank Daytype.

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.

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.

About Dates

Dates entered in the Employee record, conform to the International setting in the Windows Control Panel. You may enter: 2 apr 94 or: 2-Apr-94 or: apr 2, 1994 or any combination for April 2, 1994. 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 Employee Scheduling Icon from the Program Manager Window, or select "Run" and answer Path\ESAFW to the file prompt.

Technical information

This application creates Directories for new Departments as needed. The "Example Organization" is installed in Directory ESA1DIR during the install process. Subsequent Directories will be named automatically when new Departments are installed like ESA2DIR, ESA3DIR 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. In the WINDOWS\SYSTEM Directory, the following files must be present:

THREED.VBX, CMDIALOG.VBX, VBRUN300.DLL, COMMDLG.DLL

Registration

The registration fee is \$49.50 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 mailed if a 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 \$148.50) 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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