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Related To Online Templates

Our templates are available here

Refresh / Update Data Some of our data is updated daily

Full Screen Some of our reports can be viewed in full screen

Other Macros Other macros are available in the system

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Free Scheduling Template

This workbook is intended to help you schedule your employees.

The first two tabs allow for data entry, while the following two tabs provide a summary of the data and are fully automated.

The example data has been entered to serve as an example and can easily be changed.

The 'Schedule' tab is where you will fill in each employee's scheduled hours. Relevant information from the 'Lists' tab will automatically populate on this sheet and the 'Dashboard' sheet.

The 'Summary' tab gives an overview of the employees and the number of hours they're scheduled to work each week. This tab also shows you the number of employees in each role scheduled per day to help you ensure a shift leader or supervisor is always on each shift, for example. This tab also gives you an overview of who is working more than 40 hours each week, which is indicated by a light red shading in those cells.

The 'Employee Information' tab is where you will fill in the employees' information, such as their names, employment type, and employee ID. Here you can also choose which day convention you would like to be displayed on the Schedule sheet by selecting a value from the drop-down menu (Option 1, Option 2, Option 3).

The 'Settings' tab is where you will customize the Schedule and Dashboard tabs. It contains options for 4-week and 6-week schedules, different shifts, and the number of employees within your company.

When first using the sheet, please fill out the "Lists" and "Settings" tabs first for the best user experience.

The "Schedule" and "Dashboard" sheets have been locked to prevent accidental changes to formulas. These sheets can be unlocked using the password "ces". Sheets must be protected again using the same password.

Employee Information

Use the 'Employee Information' tab to enter the employee schedule for each shift using the drop-down menu in the first column. Relevant information will automatically populate in the second, third, and fourth columns.

Upload your own logo and company name. To do this, left-click on the existing "Company Logo" image and choose "Change picture," then "From a file..." and find your logo image on your hard drive or wherever it's saved. If you do not have a logo, you may simply delete the example image and leave the space blank. The company name is then updated by replacing "Company Name" with your company's name.

In the main table under the daily headings (Mo, Tu, We,...), enter the total hours each employee is scheduled to work each day. There is a different table for each shift. If you have selected more than one shift on the Settings tab, you may need to scroll down to view the 2nd and 3rd shift tables.

To clear all time entries from the schedule, click the "Clear Schedule" button in the top left corner. This will prompt the user to ensure they would like to clear the schedule. Click "yes" to proceed or "no" to cancel.

Dashboard

Information from the 'Schedule' tab will automatically populate the relevant information here, and the options from the 'Settings' tab will customize this sheet's format.

Upload your own logo and company name. To do this, left-click on the existing "Company Logo" image and choose "Change picture," then "From a file..." and find your logo image on your hard drive or wherever it's saved. If you do not have a logo, you may simply delete the example image and leave the space blank. The company name is then updated by replacing "Company Name" with your company's name.

our employee information, including their name, employee type(Full Time = FT, Part Time = PT), and employee

the day of week format. To do this click the dropdown menu next to "Select an Option".

gs"

follow these steps in the order they're laid out.

which shifts are available in your company. If there is a "check" in the checkbox next to the shift name then that shift is active and ready for information to be stored and displayed on the Schedule and Dashboard tabs.

If you would like to view 4-week schedules or 6-week schedules. The sheet is set to 4 week by default. In order to change to a 6 week schedule, place a 'check' in the checkbox next to the '6-week' option.

The number of employees from the dropdown menu. This will define the maximum number of employees the sheet will be set up to accommodate. *Even if the option you would like is currently displayed, please re-select the number of employees from the drop-down menu to ensure proper sheet setup.

When using the headings in Excel (Columns: A, B, C... and Rows: 1, 2, 3...) go to the View ribbon and check the "Gridlines" box.

Important to note that if you make a change to the shifts currently being displayed you need to reselect the number of employees from the drop down menu.

Our templates are compatible with online service but some templates that including macros feature is still not supported. We have provided some hints that replace our macros in case of using Online Template

For our templates include **Refresh/Update data** macro button that can be replaced with Refresh All tool in Excel

For our templates have **Full Screen** macro button that can be replaced with the itself web browser full screen tool

Macros is applied on less than ~15% of our templates can be overcome by transferring to Desktop App **"Open in Desktop App"**

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with Excel Online

Online ribbon

or

Desktop App" button

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