

Operational planning manual

Introduction

This APP is specially designed for retail stores. It can be used without a license and is free of charge. The program was created with Office 365 and contains VBA programming, f.e. Typ.xlsm, therefore, you will be made aware of this when you open it and will have to confirm that you want to allow this.

Your PC must have Windows 7, 8 or 10 and have Office 2010 or higher installed for all functions to run correctly.

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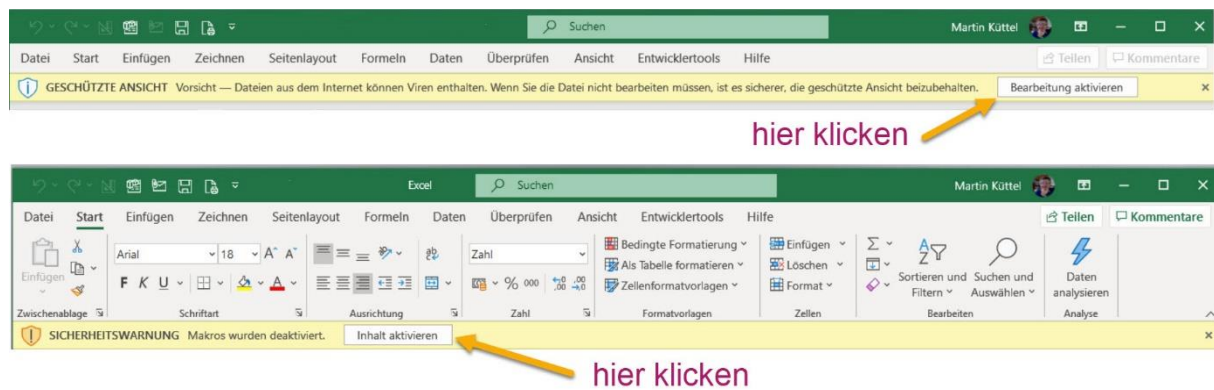
General

The very first time you open the app (Excel file) you will be prompted to confirm that you want to enable editing (because downloaded from the internet). You also have to confirm that you want to activate the content (this is a VBA security mark of trust).

The following 2 pictures show what this looks like.

The opened file is currently still in the download folder.

After that, you should immediately save the file to the folder of your choice and name the file whatever you want. Make sure that you can find the file again.



All data in the pattern file is fictitious and may be deleted or modified.

Overview of the tables

The following image shows the table structure with annual calendar.

	A	B	C	D	E	F	G	H	I	J
1		Menü	De	Morgen			Nachmittag			Kommentar
2	Datum	Tag	Woche							Deutsch
21	14.01.2022	Freitag	2			Fabienne			Fabienne	
22	15.01.2022	Samstag	2			Fabienne			Fabienne	
23	16.01.2022	Sonntag	2							
24	17.01.2022	Montag	3	Anina	Bettina		Karl	Anina		
25	18.01.2022	Dienstag	3	Anina	Bettina		Karl	Anina		
26	19.01.2022	Mittwoch	3	Anina	Bettina		Karl	Anina		
27	20.01.2022	Donnerstag	3	Anina	Bettina		Karl	Anina		
28	21.01.2022	Freitag	3	Anina	Bettina		Karl	Anina		
29	22.01.2022	Samstag	3	Anina	Bettina		Karl	Anina		
30	23.01.2022	Sonntag	3							
31	24.01.2022	Montag	4		Hans		Anina		Harald	
32	25.01.2022	Dienstag	4	Hans			Anina		Harald	
33	26.01.2022	Mittwoch	4	Eliane	Anina	Hans	Anina		Tamara	Besprechung 9:15
34	27.01.2022	Donnerstag	4	Harald	Hans		Anina		Harald	
35	28.01.2022	Freitag	4		Hans		Anina		Harald	
36	29.01.2022	Samstag	4		Hans		Anina		Harald	
37	30.01.2022	Sonntag	4							
38	31.01.2022	Montag	5							
39	01.02.2022	Dienstag	5		Fabienne					

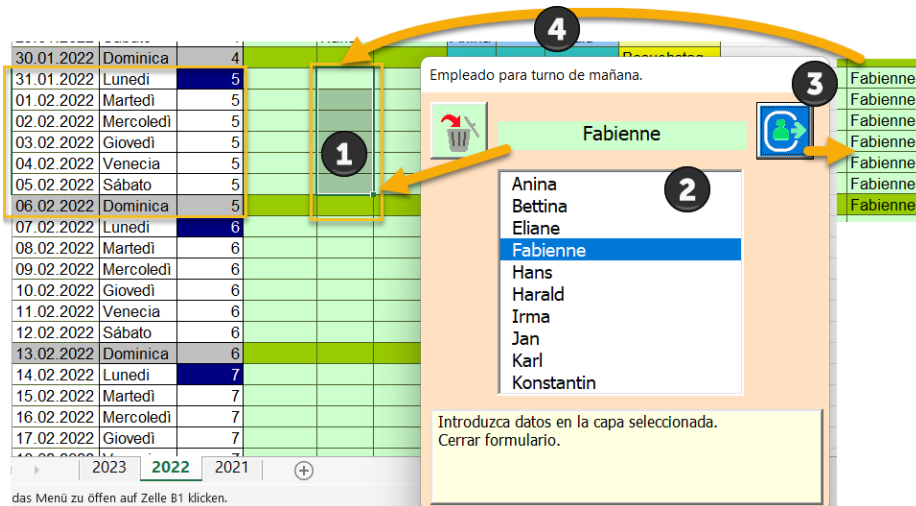
- 1 Open menu
- 2 Copy week and paste elsewhere
- 3 shift morning
- 4 shift afternoon
- 5 Remarks

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Operating options in the table

Insert, change, or delete a person

To do this, simply click on the desired cell or cell range (Monday-Sunday) and the Employees dialog opens.



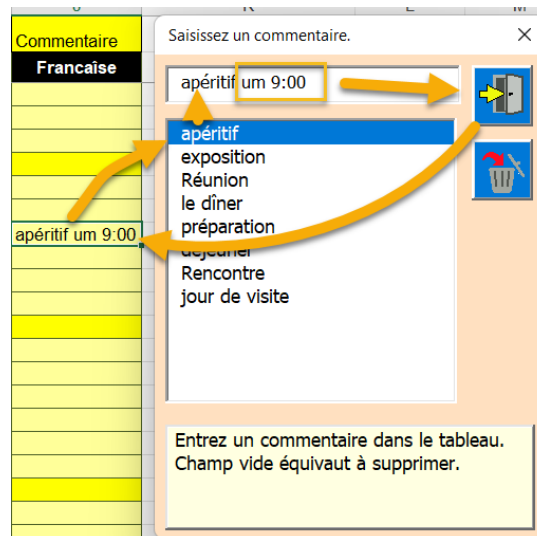
It is operated in 4 steps

- 1 Selecting the cell(s) is only possible within the current week, of course limited to one column.
- 2 Select person.
- 3 Optionally enter a note (if a cell is selected)
- 4 Complete the selection with the button.

Tip: However, if you always have a similar weekly allocation, there is the [copy / paste] function with the blue field on Monday in column 4.

Edit Notes

Clicking on a yellow comment cell opens the following dialog.



Enter comment:
Manual text entry is also possible.

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By clicking in the list, the selected entry is prepared.

Enter the entry in the text box in the Comments field.

If you close with the X button, nothing changes.

Comment to delete:

Click on a comment to delete it.

The dialog opens and you close it again immediately.

This will delete the comment.

Edit weeks

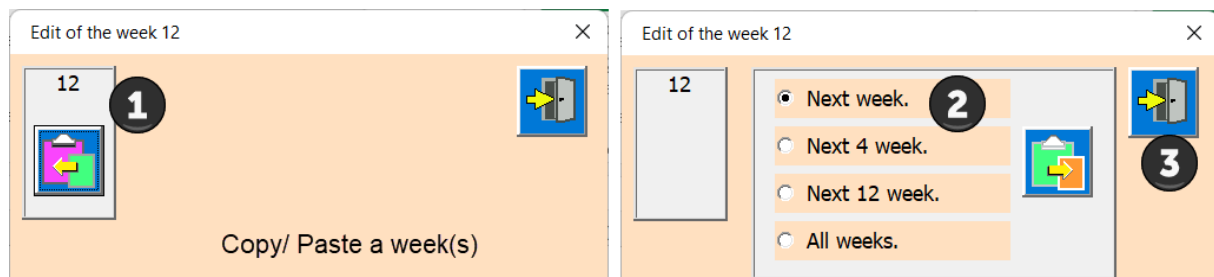
Copy paste via clipboard

You always have the option of copying a weekly booking that you need repeatedly to the clipboard and then pasting it back into the following weeks.

To do this, click on a blue cell in the calendar.

86	20.03.2022	Sonnday	11
87	21.03.2022	Monday	12
88	22.03.2022	Tuesday	12

The Week dialog appears.



1 Save to clipboard.

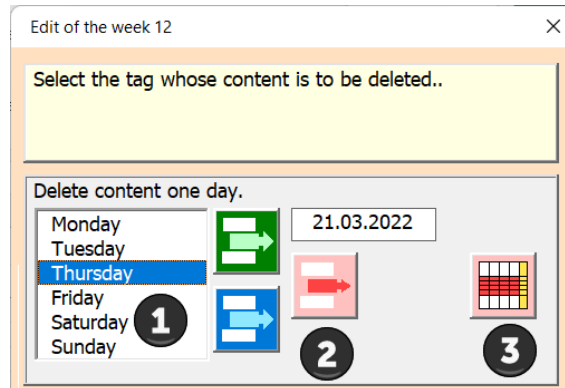
2 Choose one of the options (number of weeks)

3 Paste from the clipboard into the selected area

In this way you can quickly copy an already planned week to other weeks.

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Delete a week or individual days of a week



1 Select day to delete.

2 You now have three options; morning, afternoon, or all day to erase.

3 Delete whole week.



When editing is complete, close the dialog with the button.

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Menu and its functions

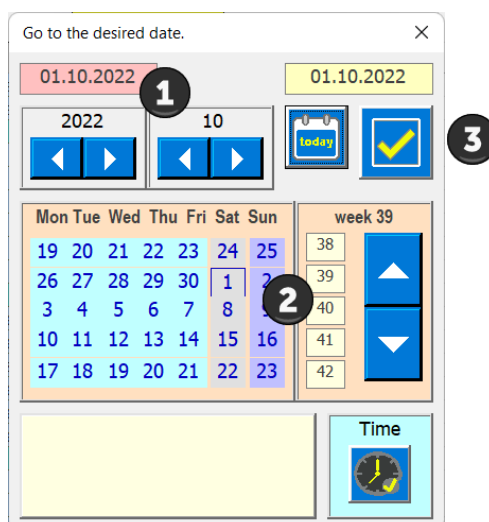
The menu contains functions applicable to all tables in the program.
Overview of the functions.



The functions of the menu are now described in detail.

Search date (1)

The calendar tool is displayed with a click. Today's date is entered by default. You can now choose another date to jump to exactly there.



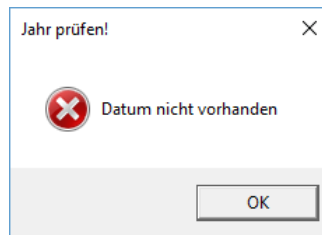
1 Select year and month

2 Choose day

3 Transfer the date to the APP (close the dialog)

If the selected date is not found, an error message appears.

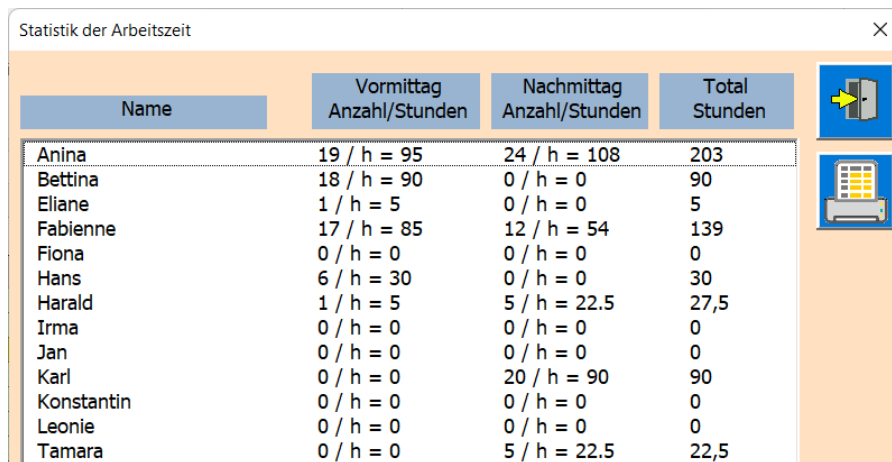
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Statistics (2)

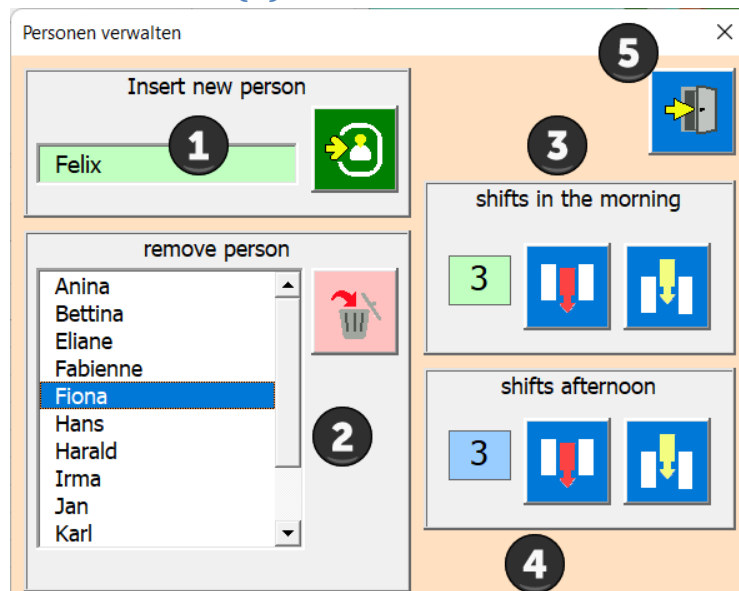


This button creates a statistic of the working hours per person. The time specifications in the Settings dialog (9) form the basis.



Name	Vormittag Anzahl/Stunden	Nachmittag Anzahl/Stunden	Total Stunden
Anina	19 / h = 95	24 / h = 108	203
Bettina	18 / h = 90	0 / h = 0	90
Eliane	1 / h = 5	0 / h = 0	5
Fabienne	17 / h = 85	12 / h = 54	139
Fiona	0 / h = 0	0 / h = 0	0
Hans	6 / h = 30	0 / h = 0	30
Harald	1 / h = 5	5 / h = 22,5	27,5
Irma	0 / h = 0	0 / h = 0	0
Jan	0 / h = 0	0 / h = 0	0
Karl	0 / h = 0	20 / h = 90	90
Konstantin	0 / h = 0	0 / h = 0	0
Leonie	0 / h = 0	0 / h = 0	0
Tamara	0 / h = 0	5 / h = 22,5	22,5

Manage people and columns (3)



- 1 Insert new person
- 2 Select and delete person (data already entered for the person remain).
- 3 Edit morning columns (insert at last position).
- 4 Edit afternoon columns (delete last).
- 5 Close dialog

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Choose language (4)

The APP enables language selection in German, English, French, Italian and Spanish.



1 Choose language

2 Apply language

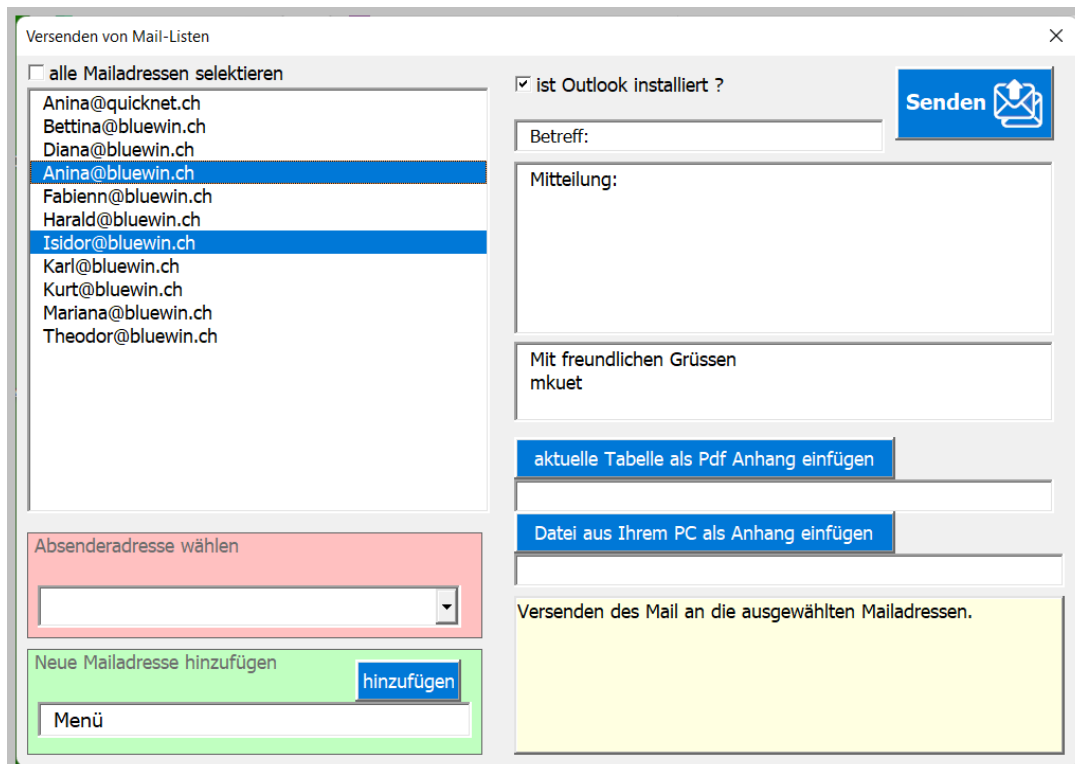
Scroll (5)



Use this button to scroll with a mouse click. Left mouse down (to the bottom of the table)
Right mouse up (to the top of the table).

Send mail lists (6)

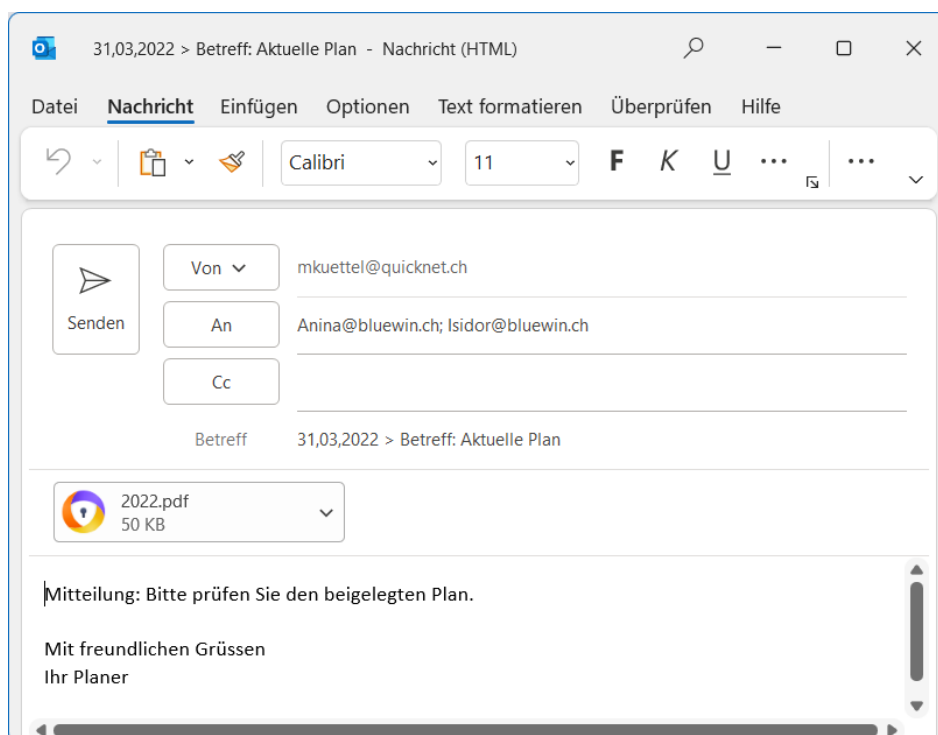
First select recipients from the list by clicking on them.



If you check the box [is Outlook installed], the input fields for the mail appear.

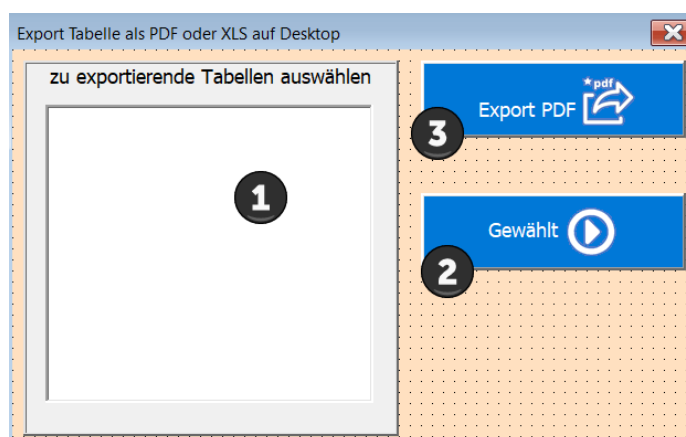
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The mail will then be shown as a preview. Any adjustments can be made there. The table and/or any document can be inserted in the mail (text file, image...).



Export tables (7)

This allows you to export a table from your worksheet as a PDF file.



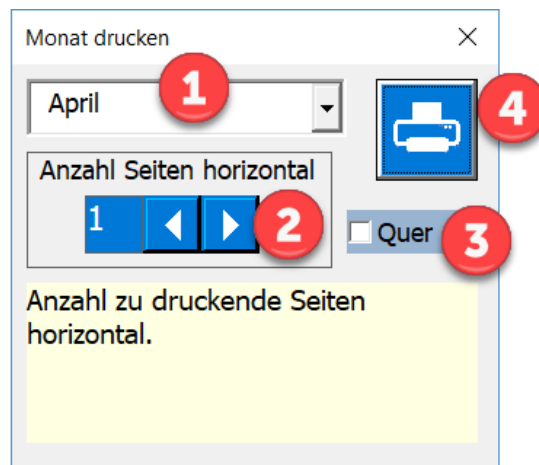
- 1 Select the table to be exported from the list.
- 2 Confirm choice
- 3 File is saved to the desktop (screen).

Print per month (8)




Now the [Print month] dialog is shown.

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- 1 Select the month to print
- 2 Choose the number of pages horizontally (per page about 6-8 layer columns fit on one page)
- 3 Choose the page format landscape or portrait (default is landscape)

Start the print preview. 

Example of a print preview.



You now have the option of printing or simply closing the print preview without printing.
 Note: The month always begins with the week in which the 1st of the month is and ends with the Saturday of the week in which the last day of the month is.

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Settings APP (9)



This button opens the mask for the user-defined APP settings.

Settings

Titel Plan / Planifier / Piano

Firma Shop Interlaken

Benutzername mkuet

Définir la vue du tableau.

Zoom 125 Toolbar

Zoom 100 header lettering

Zoom 75 edit line

Zoom 60

hours in the morning
5

hours afternoon
4.5

Customize the fields and options to suit your needs.

APP info and user manual (10)



This button opens the About dialog.

Informationen zu Applikation [deutsch]

Title livre de caisse

Subject Planung

Author mkuettel@bluewin.ch

Keywords

Comments Last Update 10.09.2022

Template

Last author Martin Küttel

Revision number

Application name Microsoft Excel

Last print date 27.09.2022 14:02:59

Creation date 05.09.2006 22:12:15

Last save time 27.09.2022 14:01:48

Total editing time 0

E:\AA_Excel\AE_Einsatzplan\Bed_Einsatzplan.pdf

The function is explained with mouseover in the instruction field.

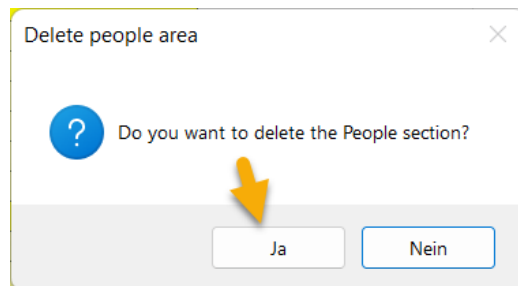
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Delete person area (11)



This button deletes the person area in the selected table. Columns 1-3, title lines 1+2 and formatting are not affected.

You must confirm the action.

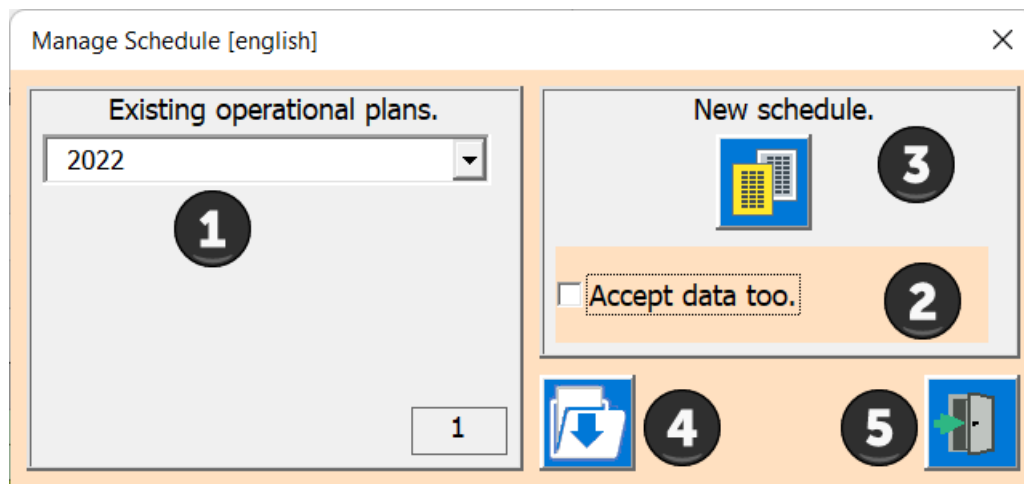


New planning year (12)

This creates a new sheet (as a copy with formulas and formats of the selected sheet) and generates a calendar for the year XXXX.



This button opens the New Sheet dialog.



- 1 Select the table that is to serve as the database.
- 2 Define whether the data of the base table should also be entered.
- 3 Create the new sheet.
- 4 The button creates a save file on the desktop.
- 5 Close the dialog.

Tips

Entries in draft mode

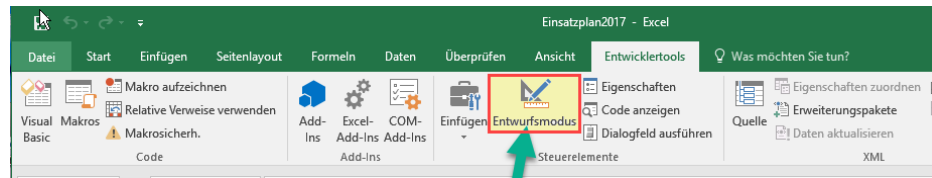
The program controls the input area using dialogs.

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If you want to avoid this (e.g. to copy an area of the table, print ...) the program must be switched to draft mode.

This is how it works:

Open the Development Tools tab on the ribbon and click Design Mode.



hier klicken (Toggelfunktion)

As a result, the table behaves like a normal Excel sheet, i.e. the APP functions are inactive. But don't forget to deactivate the draft mode in the same way after editing.

Table «Val»

This table is normally hidden and should not be changed by the user. It is managed exclusively by the APP and contains values that are used in the masks.

Some names have also been defined, and you must also leave them unchanged.

Table «SpachId»

This table is normally hidden and should not be changed by the user. It shows how the languages are defined in many ways in Windows.

Kind regards
the author Martin Küttel