



# 1 Introduction

Personnel shift planning with Shiftplan Manager will enable you to optimally plan your personnel with the minimal amount of effort.

To help you quickly become accustomed to using our product we have prepared this quick introduction, to cover the first planning steps. Should you have deeper questions please first refer to the accompanying manual delivered either as a printed handbook or as the online version in PDF-format.

As a first step we recommend you take a look in the demo example to familiarise yourself with creating and editing plans. In the manual the chapter “First Planning with Shiftplan Manager” is also based on this example.

As a second step you can then begin to build configurations to suit your own projects, with a bit of practice we are sure you will be able to solve complex planning issues.

While working with Shiftplan Manager you can press the F1 key to open the online manual automatically at the correct page.

If you are having difficulties or run into problems, please do not hesitate to contact us.

## 2 Three steps to using Shiftplan Manager

To implement Shiftplan Manager as part of your operation you will need to follow three steps:

First, the Shiftplan Manager **configuration** combines the definition of existing resources, the tasks which they perform and if needed, the different users of the schedule who may have different access rights.

With a completed configuration the second step, the **planning** of a schedule, may begin. According to the configuration, tasks can be planned automatically and/or added by hand to create the desired schedule. Automatically planned tasks can of course be edited and interactively planned around the current status. An individual schedule advances through three stages: being planned, actual and closed.

The completion of a schedule provides the **statistics** with differences between planned and actualised tasks as well as maintaining overtime and holiday accounts for each resource.

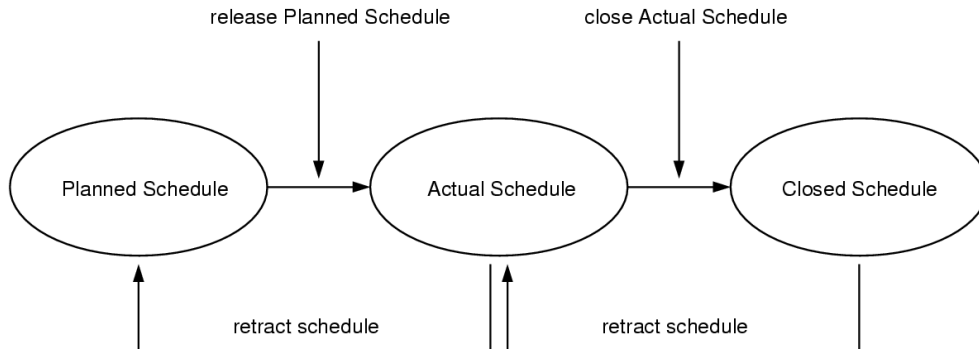
Analog to the three steps of operation, Shiftplan Manager provides you three views of a schedule.

- **Configuration View**
- **Planning View** and
- **Statistics View**

Please be aware that the three views all apply to the same plan, but viewed from a different perspective.

### 3 The three stages of a Schedule

In the planning step Shiftplan Manager has three stages which a schedule passes through: the **Planned Schedule**, the **Actual Schedule** and the **Closed Schedule**.



**Figure:** Planning a schedule for a time period.

- **The Planned Schedule** is a schedule which is not yet fully complete; users entrusted with the task of creating schedules are still working on it. Once satisfied they release the schedule for all to view.
- **The Actual Schedule** is a released schedule; after the schedule time has elapsed, changes in the tasks due to shift swapping and absenteeism are logged, so that a final schedule may be passed to book-keeping and administration. Once all changes are complete the schedule may be closed.
- **The Closed Schedule** is a schedule which is maintained only for book-keeping and providing carry-over statistics for future schedules.

The ways in which schedules may be edited during the three phases varies and is oriented toward the specific phase. For a detailed description please refer to the manual, here it should suffice to know that sometimes it might be necessary to reset, for example, a closed schedule to be an actual schedule so that the schedule may once again be modified.

### 4 Opening a Schedule

”Double Click” the icon for Shiftplan Manager. Initially, a login window appears to confirm your access.

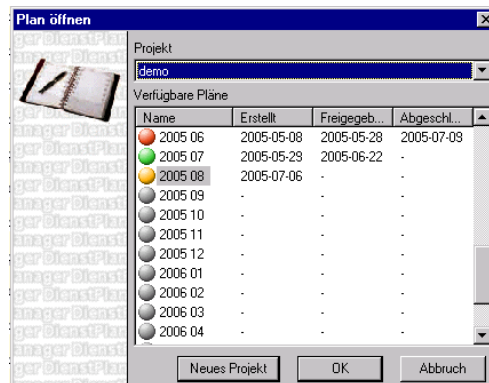


**Figure:** Verify User Access

For the first activation of a new installation of Shiftplan Manager please login as user **superuser** so that you may utilise the full functionality and define your own users.

For the first activation of a demonstration version of Shiftplan Manager please login as user **demouser**. This provides you the full functionality but for a limited time period.

After your successful login, the “Open Plan” window appears to allow selection of the **projects** and the corresponding **schedules**.



**Figure:** Open Plan

Shiftplan Manager distinguishes projects and schedules, from within a project. A **project** corresponds to the configuration that you would like to plan, a schedule to the individual plan for a given time period. In this window you may select a plan from an existing project or start a new project.

The list of selectable projects can be seen by clicking on the arrow to the right of the default project name. The schedule time periods correspond to the selected project.

The colour point next to the schedule shows the status of the plan: grey (no schedule exists), yellow (planned schedule exists), green (actual schedule exists) and red (closed schedule exists).

## 5 The Planning View

The Planning View will appear after the selection of the schedule. For a new project, an empty planning window in the **Configuration View** is opened; for existing projects the plan is opened in the **Planning View**.

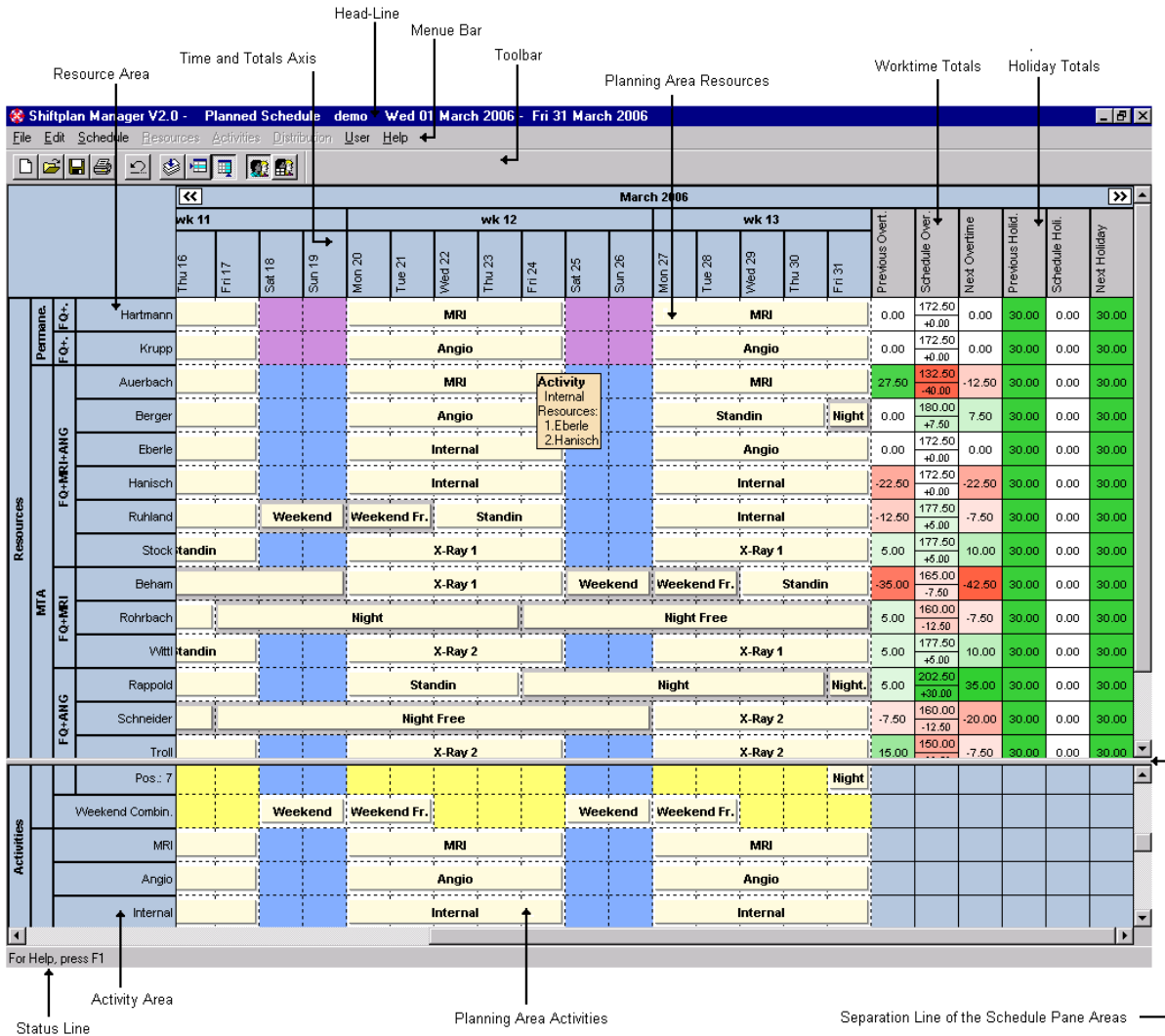
In the following, we have used a planned schedule to better illustrate the the different areas of the view. **The Planning View** is divided into the following parts:

- **The Resource–Area**  
contains all resources organised in classes and groups.
- **The Activity–Area**  
contains all activities organised in classes.
- **The Time and Totals axis**  
contains the selected planning time period divided into weeks and days. The divisions of the time axis can be specified individually to match your own planning requirements as part of the configuration. At the right hand end of this axis the overtime and holiday totals are displayed (when selected) and updated during planning.
- **The Planning Area**  
The planning area is divided into the Planning Area Resources in the upper half and the Planning Area Activities in the lower half. The Planning Area Activities shows all to-be-planned activities in the respective time cells, in the Planning Area Resources activities are shown once the resources are assigned.
- **Menus and Buttons**  
enable and simplify the operation of Shiftplan Manager.

- **The Status Line**

shows interactively the next step of the current operation, of commands as they are performed.

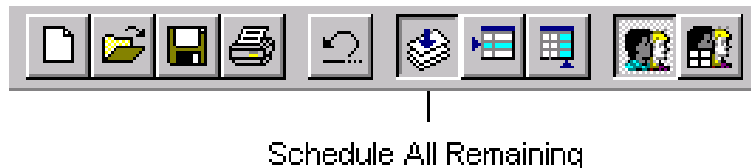
You will see a short description of an activity in Planning Area with the planned and unplanned resources as you move the mouse over an activity.



**Figure:** The Planning View

In our example, the Activity–Area contains different activities; the whole Activity–Area and Resource–Area can be expanded or reduced by clicking on the edge and dragging, or by shifting the separation bar between the two areas, to make more entries visible.

To obtain a similar plan on your machine to that shown, click on the “Schedule All Remaining” button:



**Figure:** Schedule All Remaining

The Configuration View shows resources on the vertical axis and activities on the horizontal axis sorted according to their classes and groups. In the Planning Area the skills matrix shows which resources may perform which activity.

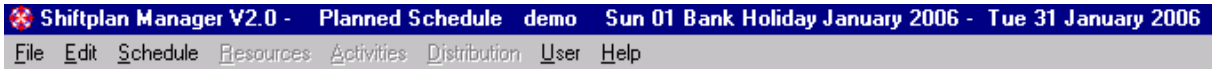
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			Shift						Shift Combin.		Workplace							
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For Help, press F1

Figure: The Configuration View

Further details on the configuration view and its configuration commands can be found in the manual chapters 5-8.

## 6 Shiftplan Manager Menus



**Figure:** Shiftplan Manager menus

The menus at the top of the main window are described in greater detail in our manual, here we provide a brief description of the individual headings found in each of the views.

In the **Planning View** the following menus are selectable:

<b>File</b>	contains schedule commands: New Project, Open Schedule, Save Schedule, Retract Schedule, Configuration, Planning, Print Schedule, Export Schedule, Exit
<b>Edit</b>	contains commands to alter the schedule.
<b>Schedule</b>	contains planning commands: Schedule all Remaining, Deschedule All, Plan activities, Deschedule activities view selection, to select resources, activities or time periods, Zoom.
<b>User</b>	contains commands for user administration: Change Password
<b>Help</b>	contains commands: About (product information), Manual (online version) and Quick Introduction (this guide).

In the **Configuration View** the following menus are selectable:











<b>File</b>	contains schedule commands: New Project, Open Schedule, Save Schedule, Retract Schedule, Configuration, Planning, Print Schedule, Export Schedule, Exit
<b>Edit</b>	contains commands in the Configuration View to select the bank-holiday rules according to region, to export the configuration as a template for another project.
<b>Schedule</b>	contains commands in the Configuration View: view selection, to select resources, to select activities Zoom. Other commands are greyed out, these apply only in the planning view.
<b>Resources</b>	contains commands for resources: Add, Modify and Delete resource classes, groups or individual resources.
<b>Activities</b>	contains commands for activities: Add, Modify and Delete activity classes and groups .
<b>Distribution</b>	contains commands to manipulate the distribution of activities to resources, for example, to fairly allocate activities across all resources: Add, Modify and Delete Distribution.
<b>User</b>	contains commands for user administration: Change Password, Add, Modify and Delete User. (Disabled in demo version)
<b>Help</b>	contains commands: About (product information), Manual (online version) and Quick Introduction (this guide).

## 7 Shiftplan Manager Menu Buttons

The menu buttons have the following operations:



**Figure:** Shiftplan ManagerMenu Buttons

Button	Command	Description
	New Project	Starts a new project.
	Open Schedule	Opens an existing project for a selected time period.
	Save Schedule	Saves the current schedule.
	Print Schedule	Prints the current schedule or statistics.
	Undo	Undoes the last edit command in the Planning View.
	Schedule All Remaining	Automatically plans the not-yet-planned activities to the schedule.
	Details	Displays more detailed versions of the schedule.
	Show Resource Totals	Displays totals for overtime and holiday accounts as part of the schedule.
	Planning View	Switches to the Planning View of Shiftplan Manager.
	Statistics View	Switches to the Statistics View of Shiftplan Manager.

To switch to the Configuration View select Configuration from the File menu.

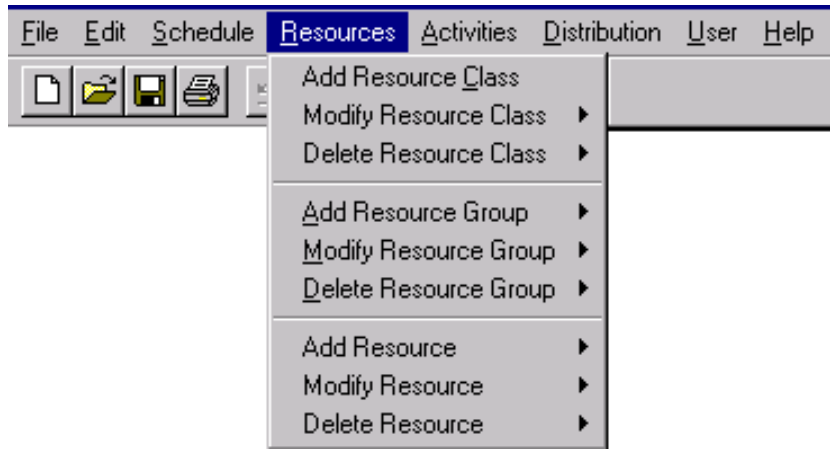
## 8 The first steps to a new plan: Definition of the Resources

The definition and changes to resources and activities is only possible in the Configuration View. You should begin by defining the resources; the definition of activities requires the entry of which resources are qualified to perform the activity.

Resources carry out certain activities. Resources should be divided into classes and groups to reflect their qualification, their skill or their availability. Different classes might for example be, the departmental sections and the groups within the classes their different qualifications.

Try to organise your resource groups so that they are easily chosen for different activities.

Select **New Resource Class** from the Menu Resources to first define a class for the first set of resource groups.

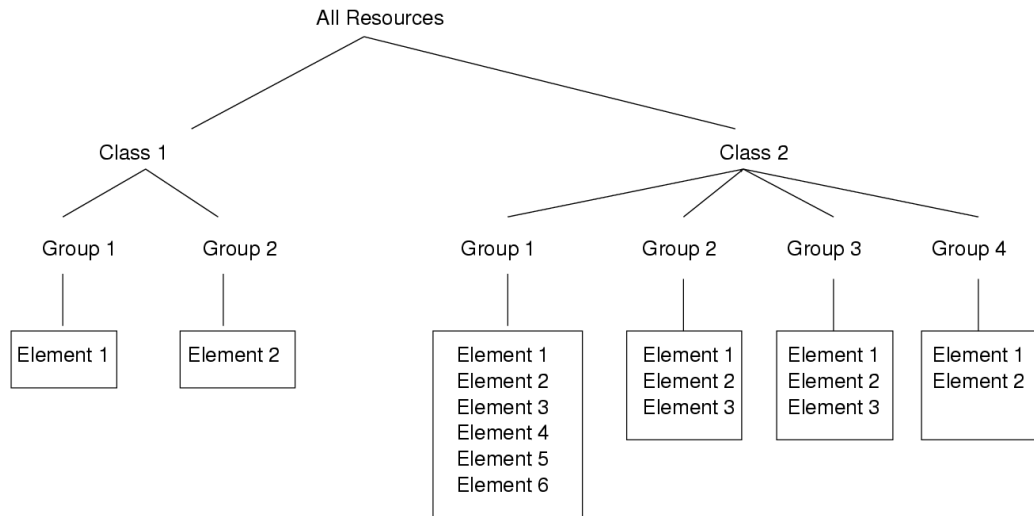


**Figure:** Definition of the Resources

As well as the name of the resource class, define the worked hours and annual holiday. These values are the default for all the resource groups within the class.

**Please Note:** when you define a resource with worked hours "0" then this resource cannot be planned automatically, as they do not work!

After the definition of resource classes, add resource groups to a class through the selection of **Add Resource Group**. Within each class, resources are divided into groups to reflect their qualification, their availability, ... Each resource group may contain individual resources identified by their name or personnel number.



**Figure:** Example of a hierarchy of resources

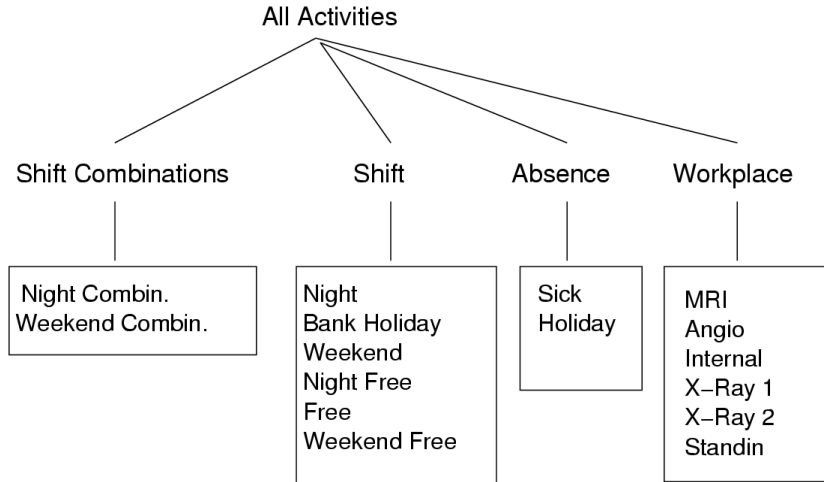
After you have entered all the resources it is time to start defining activities.

## 9 Definition of the Activities

We suggest you start with the definition of the simple activities, consider those that should first be defined so that they can be combined into compositions.

For a better overview of how the working environment is represented, activities are also divided into different classes.

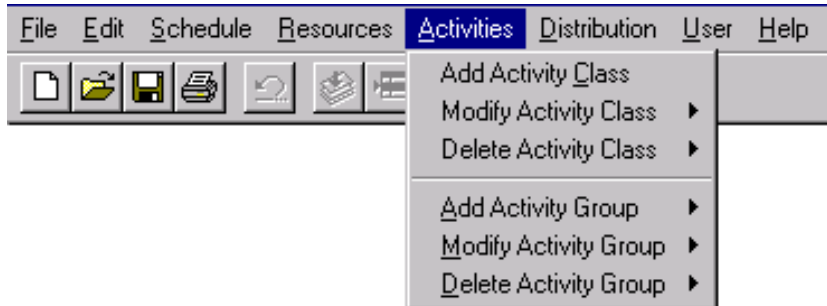
In our demonstration example “demo” the activities are divided as follows:



**Figure:** The activity hierarchy from "demo"

The activities are divided into the classes Shift Combinations, Shifts, Absence and Workplace.

Select **Neue Activity Class** from the Menu Activities to first define a class for the first set of activitygroups.



**Figure:** Definition of the Activities

The activity class **Absence** of type Absence is pre-defined to contain the groups: "sick " and "holiday ". Activities of type Absence are not automatically planable; they must be entered by hand and may be performed by each and every resource.

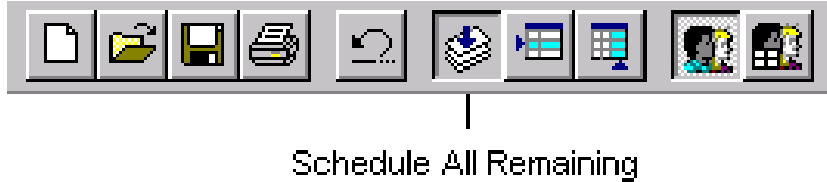
After the definition of activity classes, select **Add Activities Group** to start the Activity Wizard which will lead you through the definition of an activity group.

A detailed description of how different activities are configured is presented in the chapter "**The Activity Wizzard**" of the accompanying manual.

Activities that define a shift pattern should first be defined separately and then added to the composition in the correct order. You can find an example definition of a shift pattern in the chapter "**The Activity Wizzard**".

## 10 Automatic Planning – A first test

Having added all resources and activities, you should switch to the planning view, don't forget to save the configuration, and click the button **Schedule All Remaining** to test the planning; you will usually be able to see where any problems lie.



**Figure:** Schedule All Remaining

You will be able to see, if you have sufficient resources for all activities or whether or not all activities are manned or if some resources are not fully utilised.

Shiftplan Manager colours the background of activities to indicate where resources are available but are not planned (green), where a resource could not be found for an activity (red) or where an unqualified resource has been chosen for an activity (pink).

By defining Optional Resources or Fill Activities it is possible to distinguish between those activities that must be manned as a minimal manning level, and also to add activities that should be performed if all other activities (including the optional manning) are already populated.

By taking a closer look at the plan you will almost certainly notice that the same activities are always assigned to the same resources. Now we should consider how best to fairly allocate or restrict certain activities so that the plan is more in line with what is desired.



**Figure:** Add Distribution

Each time you add a new distribution rule test to see that your schedule is still plannable and that the resulting schedule is an improvement in the right direction.

The name of the distribution should always be unique and reflect the activities to which it applies, to make maintaining your schedule easier in the long term.

Please note, that adding distribution rules increases the complexity of the automatic planning making it slower and sometimes not always possible to assign all activities.

To test a change to the distribution rules take the following steps:

1. Define a new distribution rule.
2. Click on "Deschedule All"
3. Click on "Schedule All Remaining"
4. Check the expected distribution in the schedule.
5. poss. return to step 1. to modify or remove the distribution rule.

## 11 Starting Planning

Once you have completed the definition of all resources and activities, you can start the fine-tuning of your planning.

In reality it is often the case, that there are certain resources or activities that have higher priority in the planning. Plan these activities, as you would for other non-automated activities, in that these should first be assigned by hand.

- **Resource Planning**

The simplest way to plan a activity by hand is: in the **Planning Area Activities** mark the activity that you would like a resource to perform for the time region. (As is normal practice in Windows, click and hold left mouse button down to highlight a region, or please refer to our manual.) Click once more on the highlighted region and drag-and-drop the activity (remember to keep the left mouse button depressed) over to the resource in the **Planning Area Resources**.

By simply, marking and drag-and-dropping the activity over the resources you can very easily plan all priority activities to satisfy the wish-list of your employees.

By marking in the **Planning Area Resources** and drag-and-dropping the activity over the **Planning Area Activities** the activity will be descheduled.

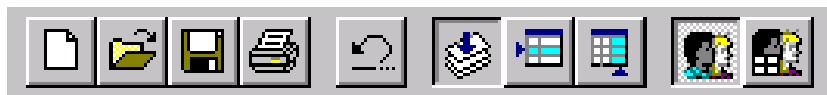
- **Activity Planning**

You may plan complete activity classes and groups, in turn, by clicking with the right mouse button on the activity name in the **Planning Area Activities** and selecting from the popup menu **Schedule Activity**. Shiftplan Manager will schedule resources for this activity when they are available.

## 12 Schedule All Remaining

Proceed as described above until you are sure that all wishes, holiday and other requests have been met. Then let the computer complete the task for you!

Select **Schedule All Remaining** from the schedule menu, or click the button:



Schedule All Remaining

**Figure:** “Schedule All Remaining” Button

All remaining activities are now assigned to resources, the currently assigned activities remain unaffected. In general, Shiftplan Manager is not allowed to break the rules laid out in the configuration. You may though assign activities to resources not usually qualified to perform tasks by hand.

After completing the automatic planning the system will indicate in the **Planning Area Activities** where an activity exists and no available qualified resource could be found. Such activities are highlighted with a red background colour.

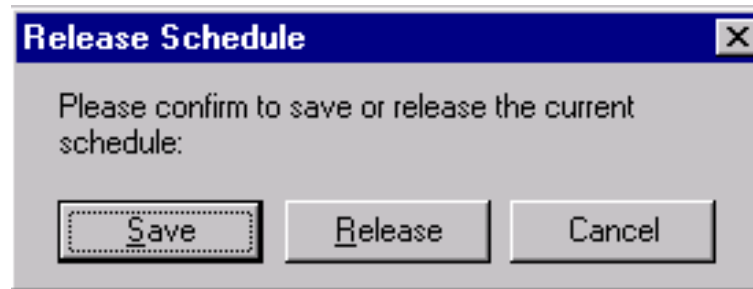
Please note, that for activities where no resource could be found, where only a single resource is to planned; that these activities will only be visible in the **Planning Area Activities**.

Where you are not quite satisfied with the automatic planning you may of course deschedule, schedule and swap activities resources some more by hand, please refer to the chapter in the accompanying manual.

## 13 Releasing a Schedule

When you are completely satisfied with the schedule it is time to release it to others, the **Planned Schedule** will become an **Actual Schedule**.

Select **Save Schedule** from the **File** menu, in the confirmation window select “**Release**”.



**Figure:** Releasing a schedule

As described previously, Shiftplan Manager can assign different user permissions, as to who may view the schedules, edit, etc. In the manual you will find detailed information in chapter **The User Menu**.

Assuming you have defined users who may only view schedules, then they will now be able to view the released schedule.

In a released schedule the differences are stored as modifications to the originally assigned activity so that a comparison can always be made. Similarly, the worked times for a resource on a day can be corrected to account for the overtime. This can also be implemented together with time stamping systems, in your operation.

Analog to releasing a schedule you can close a schedule to disable further editing and fix the statistics totals. The **Closed Schedule** can be used as a source to export to book-keeping and/or accounts departments.

We hope you will be able to make use of Shiftplan Manager to efficiently plan your shifts. We appreciate that this description can only serve to provide a quick introduction to the full potential of Shiftplan Manager and therefore please do take a more intensive look at the manual.

If you have any questions, please do not hesitate to contact us:

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