

Employee Shift Planner - User Guide

Overview

Disclaimer: This is just a trail prototype showcasing what can be done not a full-fledged product.

The Employee Shift Planner is an Excel-based tool designed to help managers and small business owners efficiently schedule employees, track total working hours, compare against target weekly hours, and monitor workload balance. It provides automated calculations, conditional formatting for quick insights, and visual charts to summarize staffing distribution.

Sheets Explained

Resources

This sheet contains the master employee list. Enter the employee name, role, and target weekly working hours. Adding a new employee here automatically updates the Summary sheet.

	A	B	C
1	Name	Role	Target Hours
2	Visar Martinaj	Team Lead	32
3	John Doe	Floor Manager	32
4	Herobrine	CEO	32
5	Steve	IT Specialist	32
6	Melinda	Operator	32
7	Goku	Operator	32
8	Miri	Operator	32
9	Liria	Operator	32
10	Ben	Operator	32

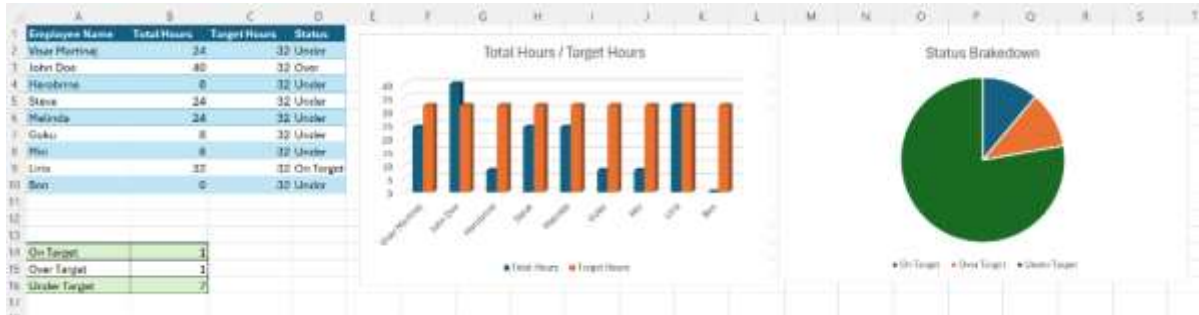
Shifts

This sheet is the weekly planner. Days of the week are arranged in columns and time slots are arranged in rows. Assign employees to shifts using drop-down lists that reference the Resources sheet.

	A	B	C	D	E	F	G	H
1	Time Slot	Mon	Tue	Wed	Thu	Fri	Sat	Sun
2	1st Shift (08:00-17:00)	Visar Martinaj	John Doe	Herobrine	Steve	Melinda	Visar Martinaj	John Doe
3	2nd Shift (11:00-20:00)	Liria	John Doe	Miri	John Doe	Melinda	Goku	Steve
4	3rd Shift (14:00-23:00)	Visar Martinaj	John Doe	Liria	Steve	Liria	Liria	Melinda

Summary

This sheet auto-calculates the total hours assigned per employee, compares them with the target hours, and displays a status indicator (On Target, Under, Over). It uses spill formulas to auto-expand when new employees are added.



Charts & Insights

Two key charts are included to provide visual insights:

- **Total Hours vs Target Hours:** Shows workload distribution across employees.
- **Status Breakdown (Pie Chart):** Displays the percentage of employees who are On Target, Under, or Over.

How to Use

1. Add employees in the Resources sheet (name, role, target weekly hours).
2. Assign shifts in the Shifts sheet using the drop-down menus.
3. Review the Summary sheet to see total hours, targets, and status.
4. Use the charts for a quick overview of workload balance.

Customization Options

- **Shift Length:** Default is 8 hours per shift. This can be adjusted by modifying the COUNTIF formula.
- **Conditional Formatting:** Colors for status (red, orange, green) can be changed under Home → Conditional Formatting.
- **Adding Time Slots/Days:** Extend the Shifts grid as needed, ensuring formulas reference the updated range.

Notes & Best Practices

- Do not delete or overwrite formulas in the Summary sheet.
- Only edit unlocked cells (Resources and Shifts).
- Use the drop-down menus in the Shifts sheet instead of typing names manually.
- Keep a backup copy before making large changes.

Support

For customization requests or support, please contact me via Fiverr.

Worked by: Visar Martinaj.

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