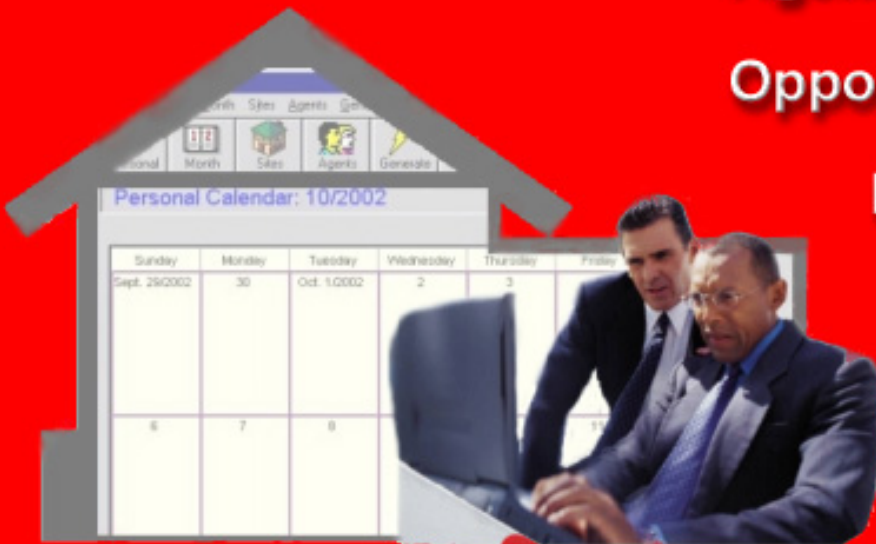# User's Guide

Agent Schedule

Opportunity Time

Duty Roster

Floor Duty

Floor Schedule
2002 Edition

CRS

Office manager's #1 tool for preparing office and site duty schedules

Table of Contents

Chapter 1
Introduction

This chapter introduces the Floor Schedule program and familiarizes you with the components associated with the system.

1.1 What is Floor Schedule?

Floor Schedule is an easy-to-use program designed to assist real estate managers with the tedious task of floor duty scheduling. The program saves time preparing office and site duty schedules and assures that the same agent is never scheduled at different sites at the same time. Floor Schedule assigns and organizes schedules for up to sixteen agents per day for each site. Each time a schedule is created, Floor Schedule automatically generates a report of assignments, by agent, that can be viewed or printed.

1.2 What are the Benefits of Floor Schedule?

o Create monthly duty schedules according to your instructions.

o Up to sixteen agents per day for each site.

o Synthesizes your requirements and instantly generates the best possible schedule.

o Allows for days off, holidays, and maximum number of duty times per agent per month.

o Saves you hours of tedious and agonizing decision making, creating an equally fair schedule to all agents.

o Permits the assignment of an individual agent to work only specific dates and times.

o Gets the job done! Whether you have a five-agent office or a seventy-five-agent organization with multiple sites.

o FLOOR SCHEDULE CAN HANDLE IT ALL.

1.3 System Requirements

Floor Schedule operates properly only if the system on which the program is installed fulfills these requirements.

SPECIFICATIONS	
OPERATING SYSTEM	• Microsoft Windows 95, 98, 2000, XP, or better
PERSONAL COMPUTER (PC)	• 32 MB RAM • 12 MB of free hard disk space • Monitor with at least 800x600 resolution • Keyboard • Microsoft Mouse or compatible device
OPTIONAL DEVICES/ CONNECTIONS	• Printer (optional, to print reports)

Chapter 2
Getting Started

This chapter provides the set of procedures that leads you through Floor Schedule installation, launch of the program and an introductory to the Main window and its components.

2.1 Installing Floor Schedule

The Floor Schedule offers two methods for installing the program. These methods include the option to download from the web or install using a CD. The installation provides full functionality and one month of scheduling capability. However when you purchase the software license, Floor Schedule provides you with the complete functionality and twelve full months of scheduling.

2.1.1   Floor Schedule Web Installation

Installing Floor Schedule from the web will not overwrite any existing license file or data that you have already entered.

1.   From your Internet provider, enter www.FloorSchedule.com.

2. From the Floor Schedule Welcome window, click *Free Trial*.

3. Enter your email address and click *Get Free Trial*.

4. Review the download instructions and click *Free Trial download*.
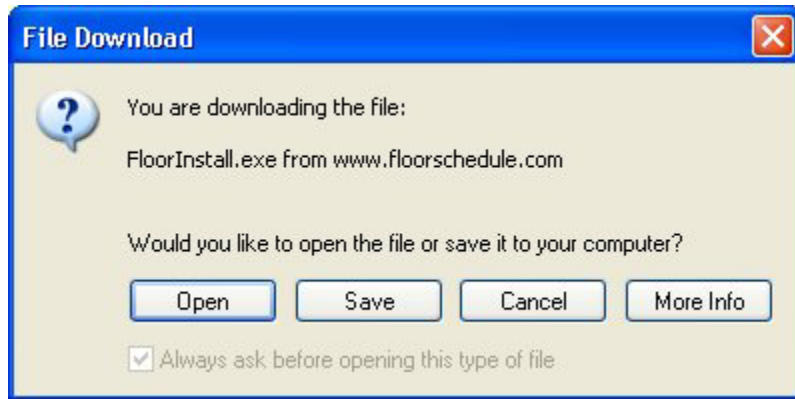
5. From the File Download dialog, select *Open* to run the installation from the Web site. The program automatically downloads.
    OR
    To download the installation file to your computer and install the program yourself, click *Save*.

    a. Select your desktop or a directory to which the "FloorInstall.exe" installation file is to download.

    b. Click *Save*.
        The program automatically downloads.

    c. When the download completes, locate the "FloorInstall.exe file" on your desktop or in the directory to which you downloaded the file.

    d. To install Floor Schedule on your computer, double click *FloorInstall.exe*.

2.1.2   Floor Schedule CD Installation for Windows 95, 98, 2000, and XP Systems

1. Start Windows.

2. Close all currently running programs.

3. Insert the CD.

4. From your Windows desktop, click *Start→Run*.

5. In the command text field, type [CD drive letter]*:\setup*.

6. Click *OK*.

7. Follow the on-screen instructions.

2.1.3   Installation Upgrades

Existing users of Floor Schedule installing an upgraded version of the program
on their computer are notified by the installation if an earlier version of the
program is found on their computer. When an earlier version of the program is
identified on your computer you will be asked if you would like to copy your
existing site, agent information and license over from the earlier version.
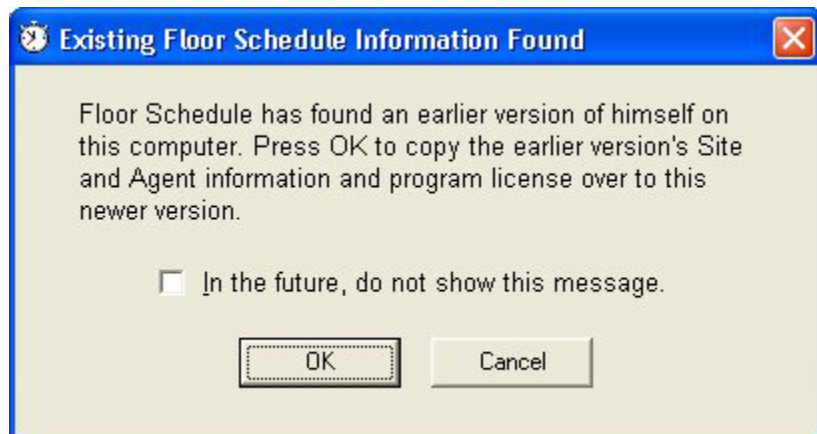
Select *OK*.

You are ready to continue generating new schedules.

2.2 Launch Floor Schedule

There are two ways to launch Floor Schedule.

1. From your Windows desktop, select *Start→Programs→Floor Schedule 2002*.
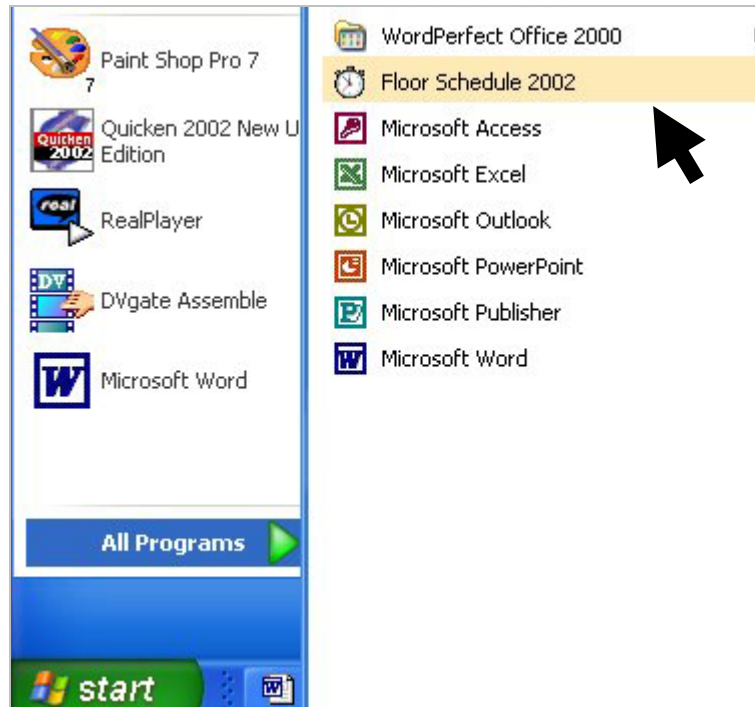
OR

2. Double click the Icon displayed on the desktop.
    The Main window will open.

2.3 Exit Floor Schedule

Floor Schedule provides two options for closing the program when scheduling transactions are completed.

A. From the Main window menu bar, select *File→Exit*.

B. From the Main window toolbar, click the exit icon.

2.4 Main Window

The Main window appears as soon as you launch the Floor Schedule program.
The Main window consists of the standard functional components found in
Window programs. The menu bar provides access to all the Floor Schedule's
task, its settings, and on-line help. The toolbar provides quick access icons to the
most frequently used menu items.

Menu bar ⟶

Toolbar ⟶
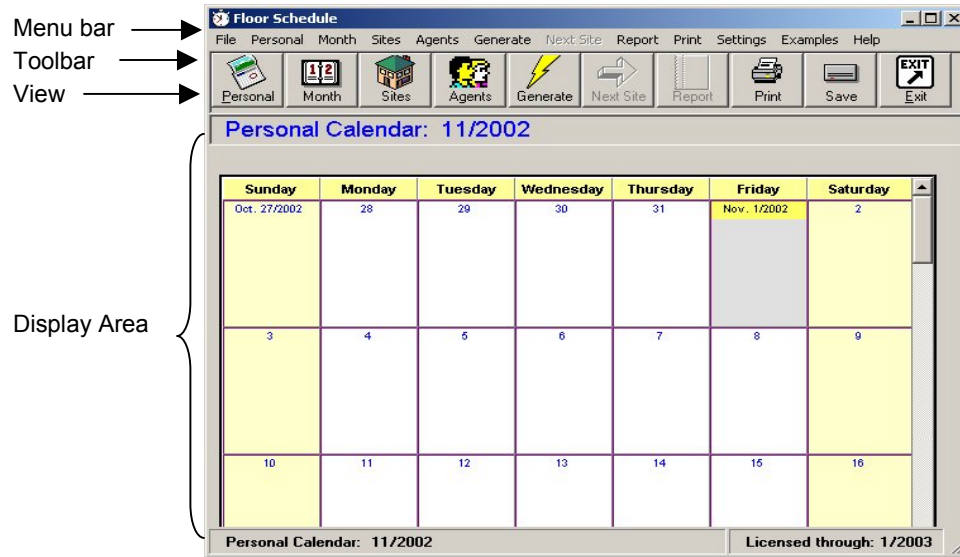
View ⟶

Display Area

The display area of the Main window provides two basic views.

- The Personal Calendar (default view) offers a simple calendar for your
  own use allowing entry of personal information.

- The Generated Floor Schedule is activated when you click Generate
  and includes access to schedule specific options.
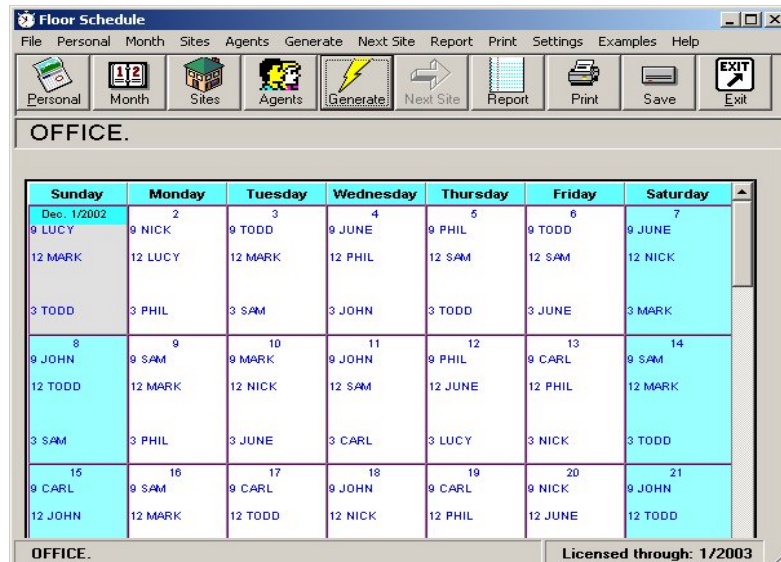
2.5 Menu Bar & Toolbar

Menu Bar	Toolbar	Description
File		
Save current schedule	Save	Saves the current schedule, including its Assignment by Agent report. Floor Schedule supports only one saved schedule. The next saved schedule overwrites the previously saved schedule. Use this feature to save a schedule that you want to come back to later for further editing. (*Personal calendar entries are automatically saved*.)
Retrieve saved schedule		Floor Schedule supports only one saved schedule. Each saved schedule overwrites the previously saved schedule. The Retrieve schedule function opens the last (and only) schedule saved.
Export (Backup)		The Export process allows you create a backup of your license and data files.
Import		The Import process allows you to restore a corrupted or lost copy of your data and license files with a backup copy.
Exit	Exit	Closes the program.
Personal	Personal	Displays the view for the Personal Calendar.
Month	Month	Window that specifies the month for which to generate a new schedule. Available months are determined by your license.
Sites	Sites	Window that manages the addition, and deletion of site locations.
Agents	Agents	Window that manages the addition and deletion of site agents.
Generate	Generate	Generates a new Floor Schedule.
Next Site	Next Site	The button enables only when more then one generated site exists. It clears the current schedule and displays the next. Any edits you make to the current calendar schedule days are lost unless saved.
Report	Report	The Assignment by Agent report containing each agent's duty times as assigned by **Floor Schedule**. This allows you to scan each agent's schedule for spacing and total times assigned. You may also give a copy of this report to agents to help them find their shifts on the Calendar schedule.
Agent Report		Generates a report on Agent assignments.
Site Report		Generates a report on Site locations.

Menu Bar	Toolbar	Description
Print	🖨 Print	Prints the current calendar view, whether Personal or Generate schedule.
Settings		
Calendar Settings		Defines the parameters for how calendar data is displayed and printed.
Schedule Times		Option to show times in place of letters for sites, days, and times.
Schedule Fine Tune		Option to select automatic Fine Tuning or Manual Tuning. Automatic fine-tuning is the recommended setting.
Examples		Provides a number of scheduling examples to copy or study as a reference.
Help		Displays options for assistance to the utilization of the program.
Getting Started		Provides a simple overview of the steps that need to be taken to create a new calendar schedule or perform program maintenance.
Generated Schedule		Provides help on how to proceed once you have generated a schedule
Web site / Latest Help		Connects you to the Floor Schedule web site help page where you can access the latest help and connect with technical support.
Web site / License update		Connects you to the license ordering page on the Floor Schedule web site.

2.6 Getting Help

Floor Schedule provides Help buttons with many of the task windows to provide quick help on that task. Help can also be accessed through the menu bar.

2.6.1   Task Window Help
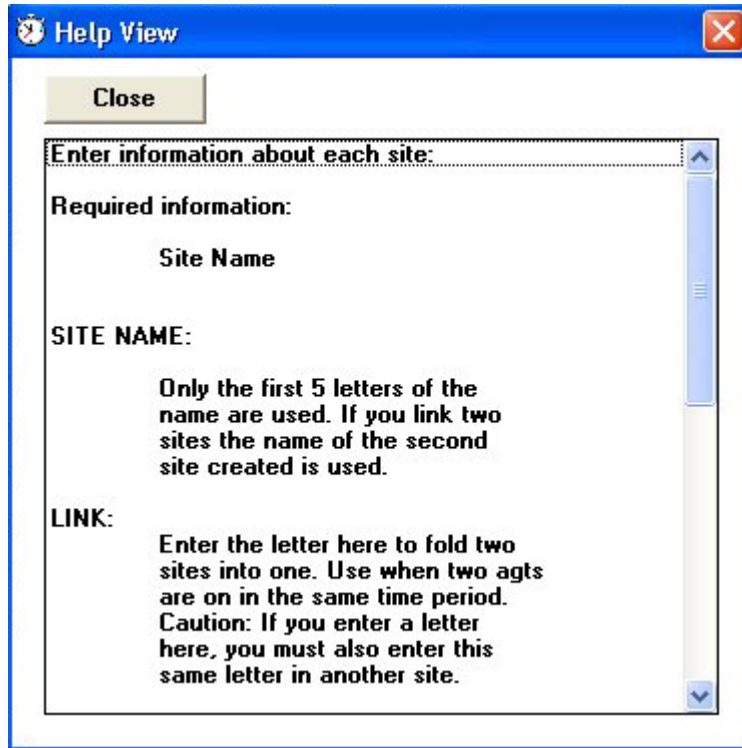
1. From the currently displayed task window, click the *Help* button.

A Help View popup appears providing instruction about the data that is to be entered into the current window.

The figure below is an example of the (*Site Information*) Help View.

2. Scroll through the Help View for information about what that control does.

3. To exit the Help View popup, click *Close*.

2.6.2   Standard Menu Help

The standard menu help identifies the steps that need to be taken to create a new calendar schedule or perform program maintenance. Standard help can also directly connect you to the website help and support. The website offers a complete user's manual available for review and/or printing in addition to an *Answer* page that contains answers to many of the questions presented by our users. Within the site a support email address is available from which you my post any questions you may have. Support is provided for free as part of the license purchase.

1. From the menu bar of Personal Calendar or the Floor Schedule Main window, select *Help*.

2. Select the preferred Help option.

    A. Getting Started

       a. For an overview of the steps that need to be taken to create a new calendar schedule or perform program maintenance, select *Getting Started*.

       b. To exit the Help View, click *Close*.

    B. Web Site/Latest Help

       a. To connect to the Floor Schedule web site help page where you can access the latest help or contact technical support, select *Web Site/Latest Help*.

       b. Select the preferred option or review the questions and answers.

       c. To exit the Floor Schedule web help, click ✖ in the upper right corner of the web page.

Chapter 3
Settings

3.1 Schedule Fine Tune

Each time you generate a schedule all agents are assigned their time slots using the Floor Schedule's unique copyrighted algorithm – Automatic Fine Tuning. This system is designed to give all agents the fairest possible schedule. It is the default setting for the program and in almost all cases you will want to leave this setting as checked.

3.1.1   How Automatic Fine-Tuning Works:

Automatic Fine Tuning weighs the factors that are most important to agents and distributes the time slots to each accordingly. The factors that are considered and balanced include: even distribution of weekend slots, even distribution of time periods, even distribution among days of the week and even distribution among the weeks in the month. Automatic fine-tuning also works to minimize back-to-back scheduling for all agents.

Automatic fine-tuning assigns all agents to a nearly equal number of duty times. To have an agent assigned less then an equal number of times, edit the agent's MAX TIMES field on the AGENT INFORMATION screen. If you do not want the agent to work any more then 6 times during the month, place the number 6 in this field.

If an agent can only work specific dates and time, use the "Agent Can Only Work" feature on the Agent Information screen. Agents assigned in this manner are excluded from the automatic scheduling process.

📄 *For most offices, you will want to leave the Automatic Fine Tuning setting on.*

3.1.2   When to use Manual Fine Tuning:

There are two circumstances where you will want to disable the Automatic fine tuning feature and set the scheduling rules yourself "manually".

Agents to work more then once a day: If you want agents to work more then once each day you must disable Automatic Fine Tuning and then uncheck the Once A Day check box.

Agent spacing: If you want strict enforcement of agent spacing – for example: you never want an agent to work two days in a row, then set the parameters for Manual Fine Tuning as follows:

1 (or 2) day before.

1 (or 2) day after.

X once a day.

Method 2.

### 3.1.3   Drawbacks to using Manual vs. Automatic Fine Tuning

Manual Fine Tuning strictly enforces all parameters you set. If it cannot find an agent to schedule for an open slot without violating the set parameters (for example, no agent can work back to back days) then it will place an "AGT?" in the slot. To manually replace "AGT?" see Edit Schedule.

Automatic Fine Tuning does the best job possible to generate the fairest schedule, balancing all factors. However, it will schedule an agent where needed, even if this results in less then an ideal schedule, in order to cover all time slots.

3.1.4   How to Set Fine Tuning:

1.   From the Main window menu bar, select *Settings*→*Schedule Fine Tune*.

   The Fine Tuning window appears.
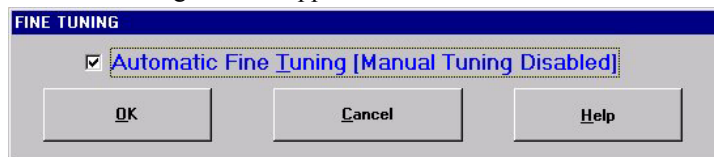
📄 *Floor Schedule's default is set to Automatic Fine Tuning. This is noted from the minimized window that appears and the Automatic Fine Tuning box is checked.*

2.   If the Automatic Fine Tuning is not selected an expanded version of the Fine Tuning window is displayed.

3. To select automatic fine tuning, click the Automatic Fine Tuning box to insert a check.

4. To perform manual tuning, click (if applicable) the Automatic Fine Tuning box to remove the check.

5. In the *Each Date Agent is Scheduled, Do Not Schedule Again* field, enter 0, 1, or 2 to represent the number of days between assigned duty dates.

📄 *Example:* *Days Before = 1 and Days After = 0 Indicates agents may be assigned to work 2 but not 3 consecutive days. 1 and 1 indicates no consecutive days.*

6. In the *Do Not Schedule Agents More Than* field, check the boxes as follows:

   o *Once a Day* - This box is always checked by default and indicates your agents will NOT be scheduled more than once per day. If you want agents scheduled more than once a day, uncheck this box.

   o *Once a Week* - If agents work 4 or less times per month, check this box so they are not scheduled more than once a week.

   o *Once Any Same Weekday* - If your agents work 7 or less times per month, check this so they are not scheduled more than one same weekday during the month.

7. In the *Assignment Method* field, select the order in which agents are assigned to the schedule based on the following:

   o *Method 1* assigns agents starting from the beginning to the end of a randomized list, then repeats itself.

   o *Method 2* assigns agents starting from the end to the beginning of a randomized list. It then moves from beginning to end, then end to middle, then repeats itself. Method 2 is advantageous when you have two linked sites or have a large number of agents and time slots to fill.

8. Click *OK*.

📄 **Caution:** *With each fine tuning, you narrow the number of available duty times any one agent may be assigned to work. As a result, some of your duty times may go unassigned (indicated by AGT?). If this happens, remove or decrease settings.*
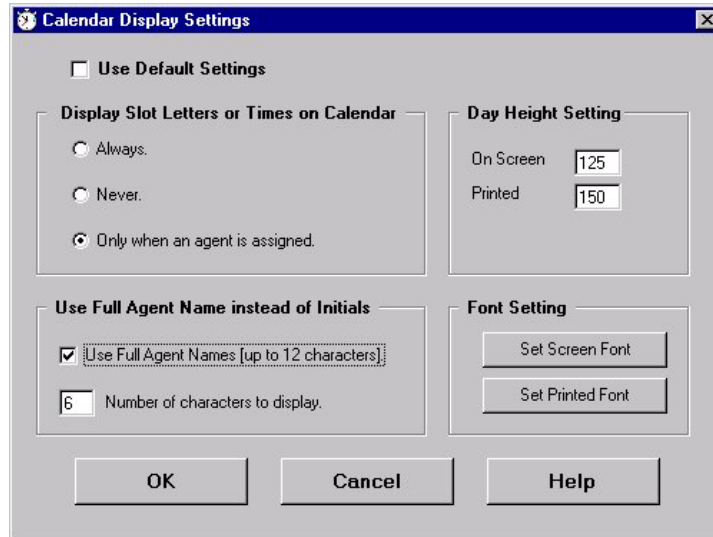
3.2 Calendar Settings

The Calendar settings allow you to adjust how your Calendar Schedule appears on both the screen and the printed-paper.

1. From the Main window menu bar, select *Settings→Calendar Settings*.

   The Calendar Display Settings window appears.

2. In the Use Default Settings box, check this box to use the default program settings.
   OR
   Remove the check from this box to use or edit your own settings.

   📄 *Default settings cannot be changed. They are included so that you can revert to them when desired. You may change the custom settings as much as you like.*

3. Select the applicable option to Display Slot Letters or Times on Calendar:

   o *Always*: Slot Letters (or Times if you are using them in place of letters) will appear for each available slot, whether or not the current site schedule uses this slot.

   o *Never*: Do not display Times or Slot Letters. Only the agent names (or initials – see #4) will appear on the schedule.

   o *Only when an agent is assigned*: Slot Letters or Times only appear if the current site schedule uses that slot.

4. In the Use Full Name instead of Initials box, check this box to have the schedule use the agent's full name (as entered in the Agent Information screen) up to the number of characters entered in the accompanying box.
   OR
   Remove the check from this box if you want the schedule to use the Initials.

5. In the Day Height Setting, enter a number to adjust the height of each day on the calendar. A greater height may be needed to show all agents scheduled for each day depending on the number of slots on that day and the font used. Use these settings to adjust the day height to your preference.

The screen day height will generally need to be smaller then the printed day height.

6. From the Font Settings, click the corresponding font button and select the desired font and size. Fonts can be set for both the screen calendar and the printed calendar. You may adjust the font, style, size, and color of the information displayed within each day.

7. Click *OK*.

3.3 Schedule Times

Schedule Times provides the option to have the program display times in place of the default slot letters.

1. From the Main window menu bar, select *Settings*→*Schedule Times*.

    The Show times in place of letters window appears.

2. For each site, select each day in that site, and enter the times you want displayed in place of the slot letters shown.
    To aid you with your entries, the slot letters in use on that day are highlighted. (You selected these slots when you entered your Site Information.)

3. Make sure that the 'Use Times in place of letters' check box is checked for each day (This is the default when you enter times).

4. From the Calendar Display Settings, verify that the 'Display Slot Letters or Times on Calendar' setting has NOT been set to 'Never'. For further information, refer to section 3.2.

    a.   To help you in this task, you may simply copy a day's times that you've already set, and use them in the currently displayed day by clicking on the appropriate day button under 'Shortcut…'.

    b.   Move to the blank day, and then press the button with the name of the day you want to copy.

📄 *For example: Monday through Friday, all have the same times. Rather then entering the times for each day manually, enter them for Monday only. Then copy Monday times to each of the other days.*

    c.   From the Select Site field, highlight the desired site.

    d.   From the Select Day field, select Monday.

    e.   Enter the times you want next to highlighted slots.

    f.   Select Tuesday.

    g.   Click 'M' under *Shortcut* to copy Monday's times to Tuesday.

    h.   Continue copying to other days using the same method.

Chapter 4
Creating a Schedule

This chapter provides the procedures that leads you through the steps and dialogs to perform the functions that create a new schedule.

4.1 New User Template

For new users, it is recommended that you select an example to use as a template for creating your first schedule. Floor Schedule provides a number of schedule set ups on which you can base your own schedule.

1. From the Main window menu bar, select *Examples*.

    The Example Floor Scheduling Setups window appears.
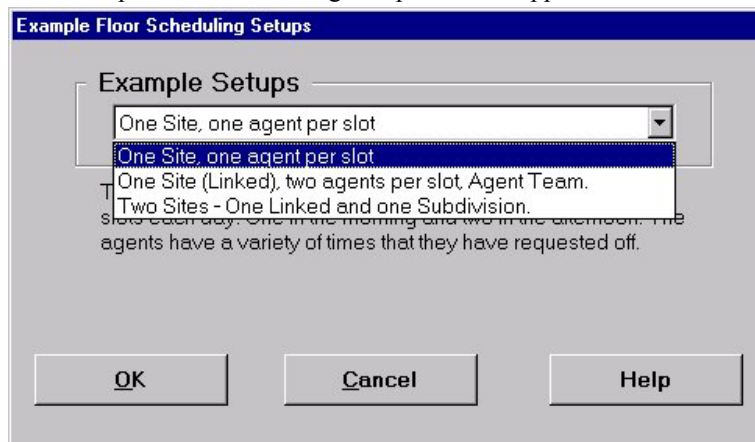
2. From the Examples Setups drop-down, select the example that best represents your specific office situation.

3. Click *OK*.
    The settings of the selected example are loaded, and a schedule based upon those settings is generated.

4. To save the example as your default setting, select *Use as Default*.

5. Proceed to section "Schedule Setup".

4.2 Schedule Setup

Creating a Schedule involves selecting a schedule period, entering site information and entering agent information.
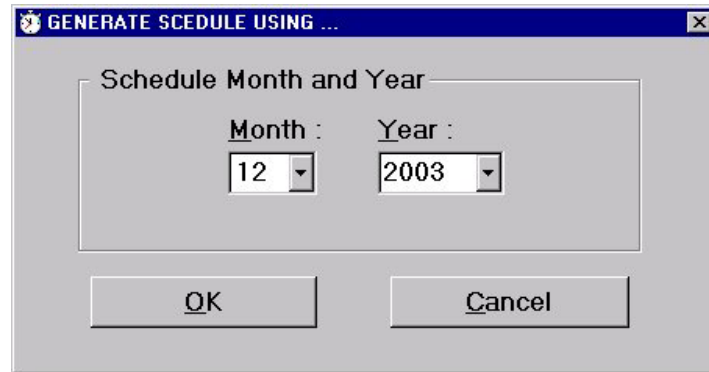
4.2.1   Selecting the Month and Year

Decide which month you want your Floor Schedule to be generated for.

1. From the Main window menu bar, select *Month*.
    OR

   From the Main window toolbar, click [Month].

    The Month window appears.

2. Using the Month and Year drop-downs, select the month and year that is to be scheduled.

3. Click *OK*.

    A message appears indicating that you plan to change the schedule month and asks if you want to delete scheduling request from the previous month.

    Since this is a new month, these previous requests are normally not valid.
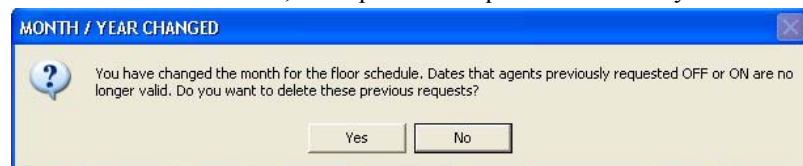
4. Select the appropriate option:

    A.   To delete the request from the previous month, click *Yes*.
          Deleting the previous month will permanently remove the dates agents requested to be off or on.

    B.   To keep the previous request, click *No*.
          The previous agent request will remain in tack.

5. From the Month/Year window indicating that the previous request are still in use or are deleted, click *OK*.

4.2.2　Site Information (Add/Edit/Delete)

A Floor Schedule must include site information. Site information contains the specifics about shifts (slots) and identifies any holidays on which the site is closed. The functions available for the site information include, changing, adding and deleting site information.

📄 *The program requires the existence of at least on site.*

1. From the Main window menu bar, select *Site*.
    OR

    From the Main window toolbar, click [Sites].

    The Site Information task window appears.

2. Perform the applicable function:

    a. To **Add** a new site, click *Add*. Proceed to step 3.
        OR
        To cancel out of the add process, click *Cancel Add*.

    b. To **Change** existing site information, use the Click List to click on the applicable site's name, use the Next/Previous buttons to locate the site, or click Find and enter the name of the site that requires change. Proceed to step 3.

    c. To **Delete** an existing site, use the Click List to click on the applicable site's name, use the Next/Previous buttons to locate the site, or click Find and enter the name of the site that is to be deleted. From the applicable site, click *Delete*.

📄 *For specific information about any of the entry fields, click Help.*

3. The Site # is an automatically generated number and does not require entry and cannot be changed by a user.

4. In the Site Name field, enter the name that identifies the site.

5. In the Slots needed fields, enter the number of duty times for each period of that day as follows:

For each weekday period (i.e. AM, PM1 or PM2) enter the number 0, 1, 2, 3, or 4 based on duty times to fill.

- o   AM can have up to 2 slots or duty times.
- o   PM1 can have up to 4 slots or duty times.
- o   PM2 can have up to 2 slots or duty times.
- o   A blank is interpreted as zero (0) or no duty time.

6.   In the Holidays field, enter any date in the current month in which the site is to be closed.

- o   Dates must be numeric and separated by a space.
- o   Consecutive dates are indicated by a hyphen (–) between the dates. *(No spaces)*

📄 *Example: if closed on the 1ˢᵗ and the 12ᵗʰ through the 15ᵗʰ, enter as 1 12-15.*

7.   If applicable, link the current site with another site: For further information, refer to section 4.2.3

- a.   In the Link field, enter a letter.
- b.   From the site you wish to link to, enter the same letter in that site's Link field.

When two sites are linked, they are placed on one calendar schedule, in effect, showing two agents working at each matching duty time. By linking two sites you may have up to 16 agents working in any one day.

📄 *Only two sites may be linked with the same letter. If the <u>same</u> letter is not entered into the linking site's Link field, the link is overlooked.*

8.   When finished adding sites, click *OK/Exit*.

4.2.3   Linking Sites

You may link two sites together to create one out of two. This is helpful in a situation that has two agents per duty slot. In this case, make two identical sites, and then LINK them by entering the same letter in the Link field of both sites. When two sites are linked, they are combined when the schedule is generated, in effect, showing two agents working at each matching duty time. By linking two sites, you may have up to 16 agents working in any one day. Only two Sites may be linked with the same letter.

The sites you link do not need to be identical. If only one agent is needed to cover a particular slot, then only enter that slot for one of the two linked sites. When the schedule is generated, only one agent will be assigned to the one-agent slots.

📄 **Caution:** *If you enter a letter in the link field, you must also enter the same letter in another site's link field. Otherwise the link is overlooked.*

You can find example of a linked site by Clicking Examples on the Menu Bar.
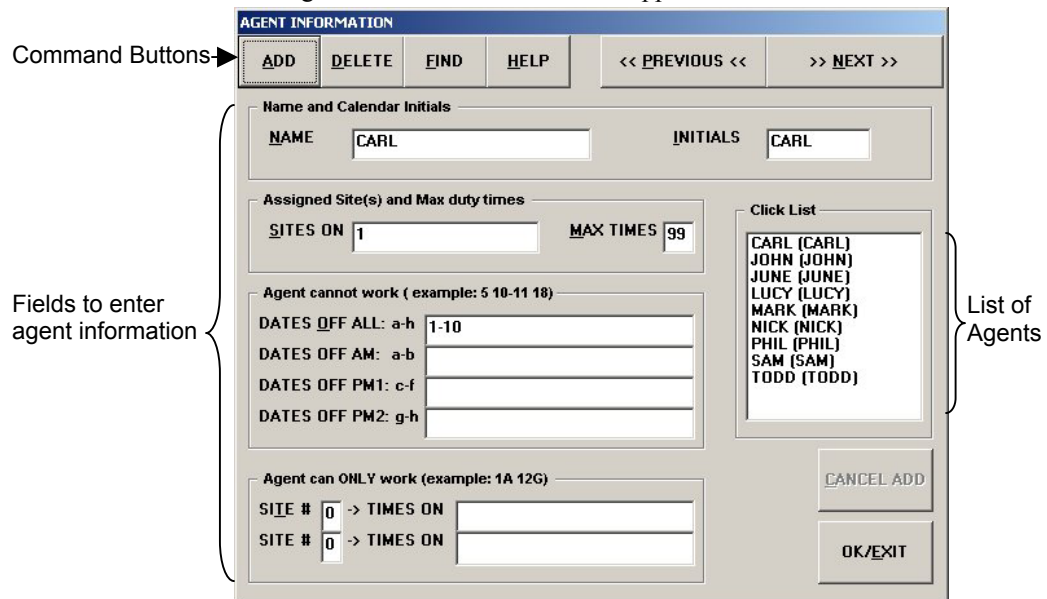
4.2.4 Agent Information (Add/Edit/Delete)

In order to complete the schedule setup, agent information must be included. The task associated to agent information includes adding agent names, changing names, deleting names and entering agent scheduling requests, restrictions, and site assignments.

> 📄 *The program requires the existence of at least one agent.*

1. From the Main window menu bar, select *Agent*.
   OR

   From the Main window toolbar, click [Agents icon] .

   The Agent Information task window appears.


2. Perform the applicable function:

   a. To **Add** a new agent, click *Add*. Proceed to step 3.
      OR
      To cancel out of the add process, click *Cancel Add*.

   b. To **Change** existing agent information, use the Click List to click on the applicable agent's name, use the Next/Previous buttons to locate the agent, or click Find and enter the name of the agent that requires change. Proceed to step 3.

   c. To **Delete** an existing agent, use the Click List to click on the applicable agent's name, use the Next/Previous buttons to locate the agent, or click Find and enter the name of the agent that is to be deleted. From the applicable site, click *Delete*.

3. In the Name field, enter the Agent's name in the First Name/Last Name format.

4. To automatically enter the 4-character initials in the *Initials* field, press the tab key after you type in a name in the *Name* field.

📄 *Either the name field or the Initials field displays on the printed schedule. The option selected in the Settings section determines if the name or initials print on the schedule.*

📄 *When adding an agent, after you move off the name field, the Initials, Site, and Max duty times fields are automatically filled in for you. We suggest you fill this information in for all agents first, then come back and enter the dates off information for those agents that have special requests.*

5. When you type a name, initials automatically fill the initial text field. Initials are 4 characters in length and may used to represent the agent on the printed schedule. To change the default initials, click on the text box and type new initials. Initials must be unique for each agent.

6. If the agent is part of a team, use a plus sign (+) as the last character of the agent initials. For further information about teams refer to section 4.2.5.

7. In the Assigned Site(s) and Max duty times field, enter the following:

   a. *Assigned Sites* - Defaults to 1. The default number indicates Site number 1. To change, click on the text box and select a new site from the pop-up list.

📄 *Example: If an agent is available to work at sites one, two and three, enter 1 2 3, separating each number by a space.*

   b. *Max Times* - Defaults to 99. The default number indicates the agent has no duty restrictions for that scheduled month. If desired, click on the box and type the maximum number of duty times an agent can work during the month. If 0 (zero) is entered the agent will not be assigned any duty times.

8. In the Agent cannot work field, enter any requested days off as follows:

   o *Dates off ALL* - Click on the text box and from the pop-up calendar, select dates agent is unable to work.

   o *Dates off AM* - Click on the text box and from the pop-up calendar, select dates agent is unable to work during the AM section of the day.

   o *Dates off PM1* - Click on the text box and from the pop-up calendar, select dates agent is unable to work during the PM1 section of the day.

   o *Dates off PM2* - Click on the text box and from the pop-up calendar, select dates agent is unable to work during the PM2 section of the day.

   o To enter a range of dates, you must manually type the dates and include a dash. For example, July 2nd through 8th should be 2-8.

9. If an agent can <u>only</u> work certain dates and times, use the *Agent can only work* fields to assign duty times. The agent will <u>only</u> be assigned the dates and times you enter:

   o *Site #* - Click the text box and select the site number from the pop-up list.

   o *Times On* - Click on the text box and type the date followed by the time slot (A-H).

📄 *Example: 1A 10C 24A. If you need more room for one site, you may enter the same site number twice.*

10.   Click OK/EXIT to save and close.

4.2.5   Working with Teams

Some agents want to work together, as teams. You may want to use teams on sites that have two agents working per shift. Set up your site to have two agents per shift using the Link feature. Now you are ready to assign a team to these combined sites.

You enter a team from the Agent Information screen, as you would any agent. To let the program know that this is a Team of agents rather then one, use a plus sign (+) as the last character of the agent initials.

For example:

Name: Team One   Initials: ONE+   Sites On: 1 2

The "+" in the initials tells the scheduler that this represents two agents, therefore, no other agent will be assigned to the same shift that a team is.

The Sites On field contains two sites because using teams requires a Linked set up, where two sites are linked together to create one, creating one shift with two agents. For further information on linking sites, see section 4.2.3, Linking Sites. You can find an example of an Agent Team set up by Clicking Examples on the Menu Bar.

4.3 Generating a Schedule

Once you enter the current month and year, enter or edit agent information, and enter or edit site information, you are ready to generate your schedule(s).

4.3.1   Generating the Schedule

1. From the Main window menu bar, select *Generate*.
    OR

    From the Main window toolbar, click [Generate].

    The generated schedule appears.

2. Floor Schedule generates a schedule in calendar format for each site. The generated schedules begin with the smallest schedule (according to the number of time slots open each week) and advance to the largest.

3. When more than one schedule exists, click [Next Site] to advance through the schedules.

📄 *Each schedule is unique and generated based on randomized lists. Each time you generate a schedule, the order of agents is reshuffled so, if you do not like the current schedule, simply generate another.*

4.3.2   Edit a Schedule

You may edit any day you wish by double clicking on the desired day on the calendar. You can also use this feature to enter your own general comments.

1. Generate your schedule. For instructions on generating a schedule, refer to section 4.3.1.

The selected schedule appears.
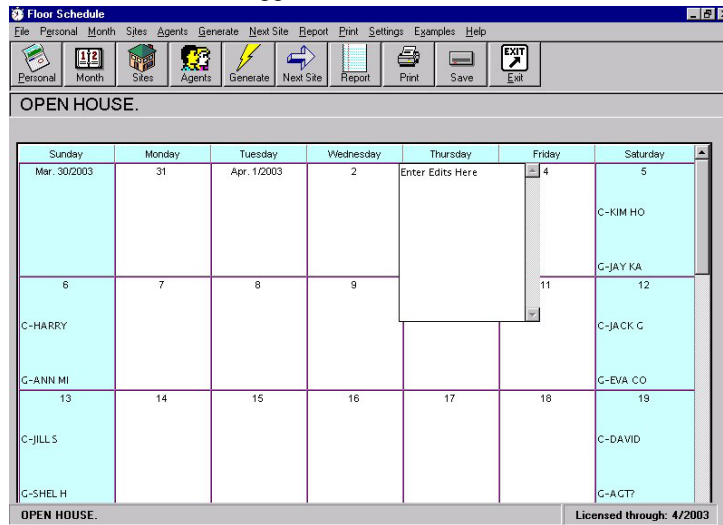
2. Double click on the calendar day you wish to edit.

3. Enter the applicable data.

4. If you want to save this schedule, click Save.

5. Press Print to print your schedule.

6. If applicable, move to the next site by clicking the Next Site button.

📄 *Edits made to the Calendar Schedule are not automatically reflected in the Assignment by Agent report. This Report only contains the schedules generated by **Floor Schedule**. However, you may edit the report to mirror your changes simply by opening the report and editing it as needed.*

CONGRATULATIONS! You successfully completed your first schedule and saved yourself the cost and time of many hours of tedious work. When it comes time to create next month's duty schedules, simply edit as needed according to that month's holidays and agents' scheduling requests. Then generate a new schedule.

4.3.3   Print Schedules

Printing your schedule consists of two parts. The Assigned by Agent report
shows you how the agents are scheduled on the calendar before printing. Choose
to print or not print this report, as you prefer.

1.   Generate your schedule. For instructions on generating a schedule, refer to
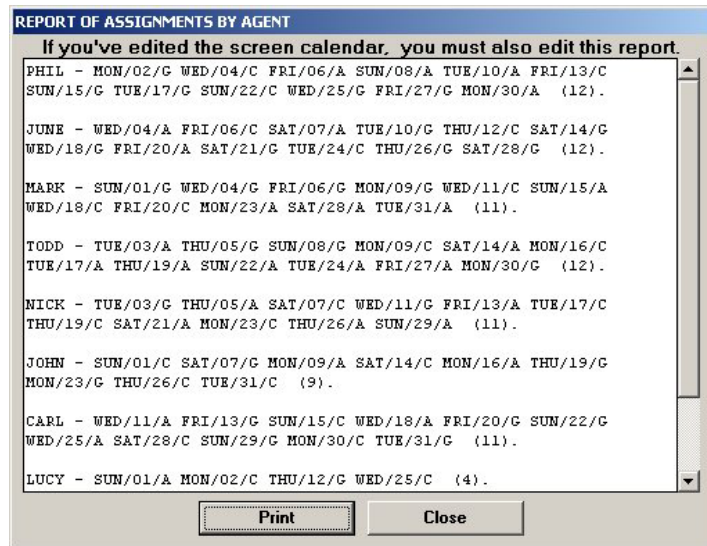   section 4.3.1
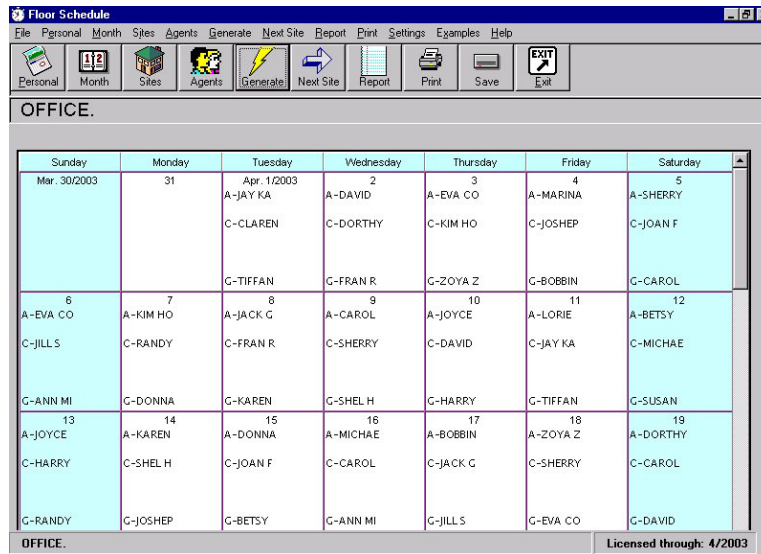
2.   From the menu bar of the selected schedule, click *Print*.
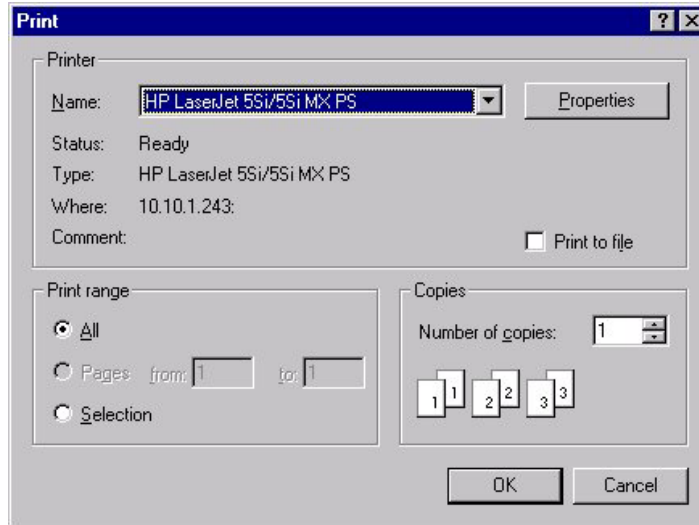   OR

      From the toolbar, click .

      The Report of Assignments by Agent appears.

3.   To print the report, click *Print*.

4.   To print only the calendar schedule, click *Close*.

The Print Window appears for printing the calendar schedule.

5.   To print in landscape mode or specify other printing options, select the *Properties Button*, then *Landscape* and any other criteria.

6.   Click *OK*.

4.3.4   Saving a Schedule

This action saves the current schedule, including its Assignment by Agent report. Floor Schedule supports only one saved schedule. The next saved schedule overwrites the previously saved schedule. Use this feature to save a schedule that you want to come back to later for further editing.
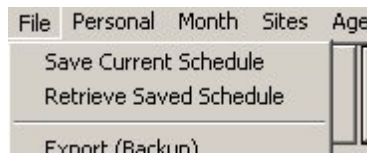
To retrieve a saved schedule, Use the File, Retrieve Saved Schedule menu option.

4.3.5   Helpful Hints

BE FAIR

Keep requested days off to a minimum and allow **FLOOR SCHEDULE** to assign duty dates and times. The more requests some agents have the greater need for the other agents to pick up their shifts.

MAX DUTY TIMES

Use the *Max Duty Times* field to limit agents' duty times. If this field is left at 99, then **FLOOR SCHEDULE** generally schedules everyone fairly. If an unfair schedule is generated because of requested days off, use this field to balance the schedule among agents.

> 📄   *Example: If Myrna has 19 duty times and everyone else has 12, set this field to 12 for Myrna and run again.*

If this field is left blank or contains a 0 (zero), then the agent will NOT be scheduled.

AGENT ORDER

Agent order effects which times are assigned to what agents. Each time you generate a schedule, **FLOOR SCHEDULE** reshuffles the order of agents. This ensures there are no repeating patterns of assignments from month to month. Each available agent is matched with his/her next available matching date, and then **FLOOR SCHEDULE** advances to the next agent. Duty times are assigned in the following order:

- o   First shift for all Saturdays, second shift for all Saturdays,…to last shift for all Saturdays.
- o   The same procedure occurs for Sundays.
- o   First shift for all weekdays, second shift for all weekdays, and third shift for all weekdays...to last shift for all weekdays.

Every other time a schedule(s) is generated, agent order is re-shuffled and shift assignment is reversed. For this reason you may wish to generate schedules more than once to see which schedule works better for you.

CHANGE SCHEDULE WITH CARE

When **FLOOR SCHEDULE** generates schedules that include more than one site for the same agent, make your manual changes to the printed schedules with care. The **FLOOR SCHEDULE** ensures no agent is scheduled to work more than one site on the same day and always ensures that no agent is scheduled to work the same time slot at two different sites.
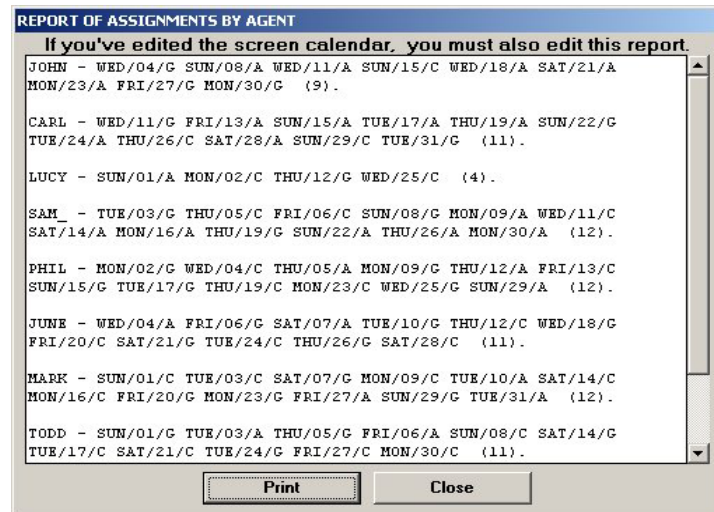
4.4 Reports

Floor Schedule offers a number of pre-defined reports that can be printed or viewed.

4.4.1   ASSIGNMENTS BY AGENT REPORT

The Assignment by Agent Report is produced automatically each time a schedule is generated, i.e., each time you select the Generate button.

1.   From the Floor Schedule window toolbar, click .

     The report window appears.


2.   To print the report, click *Print*.

     📄 *The **Print** button prints the Report of Assignments by Agent report*

4.4.2   AGENT REPORT AND SITE REPORT

The Agent Report and Site Report list the settings you have entered for Agents and Sites.

1.   From the Main window menu bar, click *Reports*.

2.   Select Agent Report or Site Report.

     Based on your selection, an agent or site report is generated and displayed on-screen.
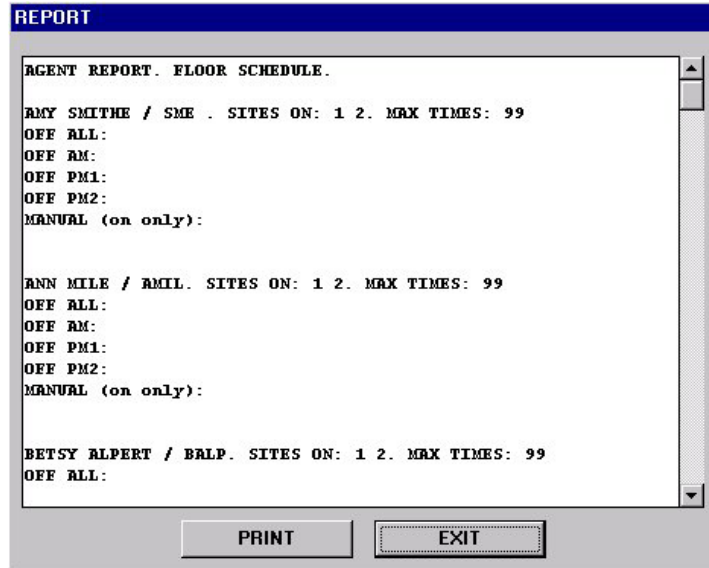
The Agent Report summarizes all information for each agent including scheduling requests or restrictions and site assignments.

The Site Report summarizes all site information including scheduling slots and office closures.

3. To print the report, click the *Print* button.

4. To exit the report utility, click the *Exit* button.

Chapter 5
Maintenance

5.1 Export (Backup)

A computer may fail at any time. It is important to have a backup of your data so that it can be restored should that be necessary. The Floor Schedule program itself may be reinstalled any time you need to from the web site, but unless you make a backup of your Site and Agent data and you license, these items may be lost to you in the event of a computer failure.

To export your data and license files:

1. From the Main window menu bar, select *File→Export*.

    The Export To Drive dialog appears.
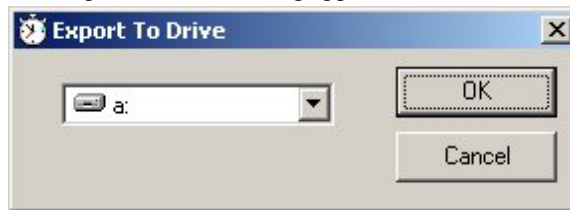
2. From the drive drop-down, select the drive to which the export your data and license files. (Normally drive A, to save the export to a floppy disk)

3. Click *OK*.

4. From the File and License dialogs click *OK*.

    - o Export copies your Data Files to the drive of your choice. In most cases you will want to export to a floppy disk in Drive a:. You may also export to any portable data storage device that is interpreted as a drive.

    - o Export creates a backup copy of your license and data files. A backup copy is always recommended for data safety. If the hard drive on your PC should fail or become infected with a virus, you will still have a copy of your data available to you.

    - o Export allows you to transfer a copy of your data and license files from one computer to the other. For additional details see Import below.

📄 *NOTE: It is a violation of your license agreement to use this program in a physical office other then the one it was licensed to. If a company has multiple offices, each office must purchase a separate copy of the program if they wish to use it within that office.*

o   The export process copies your License and Data Files to a specific folder on the target drive's root directory. This folder's name is FloorBackup. The import process looks to this directory and folder to find the files to import. This is why you are not asked to enter a complete path but only the drive. This keeps the process simple and consistent, eliminating potential confusion.

5.2 Import

Import copies your backup files from the drive of your choice. In most cases you will Import from a floppy disk in Drive A: or B: You may also Import from any portable data storage device that is interpreted as a drive.

The Import process allows you to restore a corrupted or lost copy of your data and license files with a backup copy.

1.   From the Main window menu bar, select *File→Import*.

The Import From Drive dialog appears.
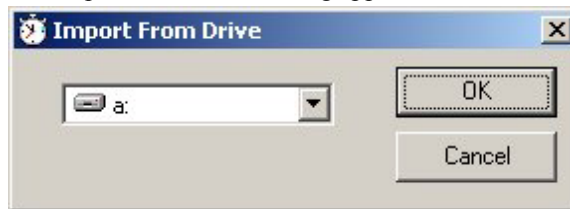
2.   Select the drive you want to Import from (normally "A".)

3.   Click *OK*.

4.   From the File and License dialogs, click *OK*.

o   Import copies your backup files from the drive of your choice. In most cases you will Import from a floppy disk in Drive A: or B: You may also Import from any portable data storage device that is interpreted as a drive.

o   During the Import process, if the file being imported is older then the file that it will overwrite, you are warned and asked if you want to continue the process.

o   Import allows you to restore your backup files. If the hard drive on your PC should fail or become infected with a virus, and you have created a backup copy of your file, you can use the import process to restore your data.

o   The export process copies Files to a specific folder on the target drive's root directory. This folder's name is F*loorBackup*. The import process looks to this directory and

folder to find the data file to import. This is why you are not asked to enter a complete path but only the drive. This keeps the process simple and consistent, eliminating potential confusion.

5.3 Troubleshooting and Support

The troubleshooting questions and answers are a collection of inquiries composed by users. Before contacting technical support it is a good idea to review these inquires in hopes of resolving your issue with immediate results.

NOTE: All support is free and included as part of your trial use of the software and as part of license ownership. You may reach us through our web site at www.Foorschedule.com. You may reach us through the Program help menu, which includes a direct connection to the web site. Our web site includes a complete section on Answers anticipated question.

5.3.1   Where's my other site?

Q. I entered two sites but Floor Schedule only printed one? Why?

A. If you put a letter in the LINK field of any one site, there must be a matching letter in the LINK field of another site. Make sure that the letters match each other or, if you do not want any linking to occur, that this field is empty (space bar) for all sites.

5.3.2   What is AGT?

Q. *AGT?* appears on my schedule instead of an agent name. Why?

A. You do not have enough agents with available time to cover all duty times. As a result, *AGT?* is printed.

To correct, check the following:

1.   Check that you are Using Automatic Fine Tuning under Settings.
2.   If you are using manual Fine-tuning is it too restrictive?
3.   Too many agents requested days off so there are not enough agents remaining to cover all shifts.
4.   Are some Agt's Max Duty Times set at zero or too low? This should be 99, except in special cases.

5.3.3   Two Agents For Each Duty Period

Q. Two agents are assigned to work each duty time. Can **FLOOR SCHEDULE** handle this?
A. Yes.

1. If the site has 4 or less duty times per day then simply enter the number of duty times twice when entering the site information. This effectively results in 2 agents being assigned for each duty time. Thus, if you have 2 duty times per day - one in AM and one in PM1 - each with 2 agents, enter duty times on your site schedule as 2 in AM and 2 in PM1. **FLOOR SCHEDULE** will now assign 2 agents in AM and 2 agents in PM1.

2. If a site has more than 4 duty times per day then use the LINK feature to bind two sites together on one calendar.

3. The LINK (see LINKING) will give you a fairer schedule where the position of the two agents is important. For example, where the second agent is only a backup.

5.3.4   Where's The Agent?

Q. One agent isn't showing up on the schedule. What's wrong?

1. Check the *Agent Information* screen for that agent. Did you enter a site number for which the agent is available to work?

2. Check the *Agt's Max Duty Times* field. If set to 0, the agent will not be scheduled.

3. Check the *Agent Can Only work, Site and Times on* fields. If you incorrectly entered this information it will not be recognized.

Index