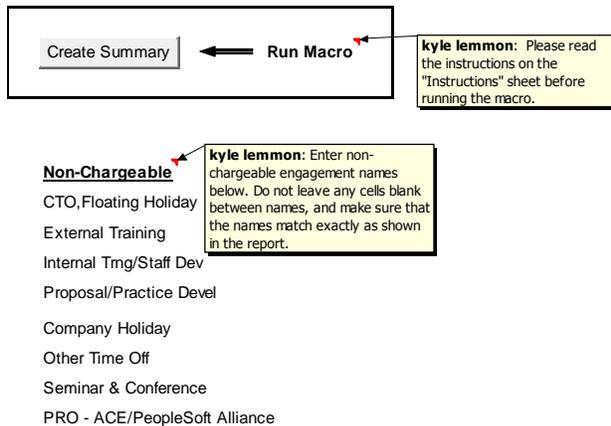
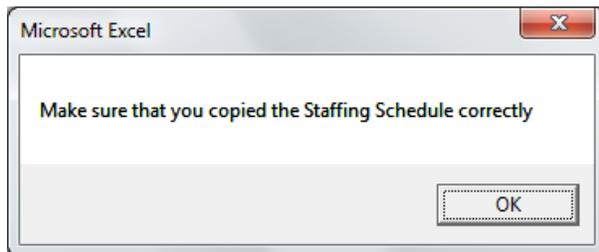


data exactly as it appears in the standard output containing the staffing schedule. The user is also instructed to not make any changes to the sheet containing the data before copying it into the "Staffing Schedule" sheet.

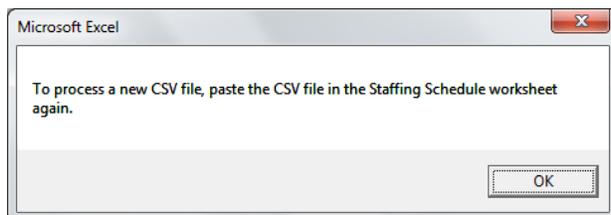
The "Home Page" sheet contains the button to run the macro, and also allows the user to enter non-chargeable engagement names if applicable. A non chargeable engagement is also known as an approved project that is not billable. The macro can also be run using the shortcut key : Control + Shift + M.



If the user attempts to run the macro before pasting in the CSV file into the Staffing Schedule worksheet, the following message box appears:



If the user attempts to run the macro with an old CSV file that already has a summary created on it, the following error appears:



After the macro runs, the data in the Staffing Schedule is reformatted so that it can be used for the summary worksheet.

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q		
1	Report ID:	RHMASTER			XX Consulting														
2					Chart Res:	Run Date	7/20/2009												
3	Start Date:					Run Time	12:41:13												
4	Thru Date:																		
5	Region:	ALL																	
6	Service Lin:	Business Risk, Risk Consulting -Technology, Internal Audit																	
7	Functional:	CN1, MD, CN2, SMR, SR2, INT, MAN, DIR, AD, SR1																	
8	Employee:	ALL																	
9																			
10	Location	Emplid	Type	Employee	Function	Service Lin	Category	20-Jul	27-Jul	3-Aug	10-Aug	17-Aug	24-Aug	31-Aug	7-Sep	14-Sep	21-Sep	2	
11	San Diego	503955	EMPL	White, Jay	CN1	Risk Cons	FRANKLIN	40	40	40	40	40	40	40	32	40	40	40	2
12	San Diego	503955	EMPL	White, Jay	CN1	Risk Cons	Company H								8				
13	San Diego	500011	EMPL	Johnson, D	MAN	Risk Cons	Longs/Vista				32R	32R	32R	32R	26R	32R	32R	32R	
14	San Diego	500011	EMPL	Johnson, D	MAN	Risk Cons	Company H								8				
15	San Diego	500011	EMPL	Johnson, D	MAN	Risk Cons	CTO Floatin		40	40									
16	San Diego	502572	EMPL	Vick, Jay E	SR2	Internal Au	INTERMOU	40	40	40	40	40	40	40	32	40	40	40	
17	San Diego	502572	EMPL	Vick, Jay E	SR2	Internal Au	Company H								8				
18	San Diego	503629	EMPL	Johnson, R	CN2	Risk Cons	Stamps, cor								32R	40R	40R	40R	
19	San Diego	503629	EMPL	Johnson, R	CN2	Risk Cons	INTERMOU	40	40	40									
20	San Diego	503629	EMPL	Johnson, R	CN2	Risk Cons	INTERMOU				40	40	40	40					
21	San Diego	503629	EMPL	Johnson, R	CN2	Risk Cons	Company H								8				
22	San Franc	502387	EMPL	Clarke, Kyl	CN2	Internal Au	EXTRA SP#	40	40	40	40		40	40	32	40	40	40	
23	San Franc	502387	EMPL	Clarke, Kyl	CN2	Internal Au	Company H								8				
24	San Franc	502387	EMPL	Clarke, Kyl	CN2	Internal Au	CTO Floatin				40								
25	San Franc	503735	EMPL	Boeing, Ch	INT	Internal Au	PRESTIGE	40	40										
26	San Franc	503735	EMPL	Boeing, Ch	INT	Internal Au	Company H								8				
27	San Franc	503735	EMPL	Boeing, Ch	INT	Internal Au	Planned Le		40	40	40	40	40	40	32	40	40	40	
28	San Franc	501246	EMPL	Keeva, Am	SR1	Internal Au	ICON		6R	8R	8R	8R	8R	8R	6R	8R	8R	8R	8R
29	San Franc	501246	EMPL	Keeva, Am	SR1	Internal Au	FRANKLIN			16	32	32	32	32	26	32	32	32	8R
30	San Franc	501246	EMPL	Keeva, Am	SR1	Internal Au	Company H								8				

The following changes occur (each at the request of the HR administrators):

- 1) Deptid, Project Role, Project ID, Industry, Sub Industry, Product, and Nature of Work columns are deleted
- 2) HR Job Function is changed to Service Line
- 3) Project Description is changed to Category

The "Summary" sheet is reserved for the output created by the macro. Initially the summary sheet is blank until after the macro has been run. The first thing the summary sheet does is show scheduling summaries by "project" or category. Even Company Holidays and Choice Time Off (CTO) are shown as their own "project". Within each category it captures the employee name, the employee grade (e.g. CN1, MAN, etc), office location, Type (employee versus contractor), that employee's assigned service line, and the hours that employee has on the schedule.

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	NAME	GRADE	LOCATION	TYPE	SERVICE LINE	07/20	07/27	08/03	08/10	08/17	08/24	08/31	09/07	09/14	09/21	09/28	10/05	
2	AMERICAN E - AEC001-INTERNAL AUDIT COSOURC																	
4	Flight,Jeffrey J	CN1	Salt Lake City	EMPL	Internal Audit	40	16	40	40	40	40	40	32	40	40	40	40	
5	Subtotal					40	16	40	40	40	40	40	32	40	40	40	40	
7	Company Holiday																	
8	White,Jay P	CN1	San Diego	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
9	Johnson,Daniel B	MAN	San Diego	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
10	Vick,Jay E	SR2	San Diego	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
11	Johnson,Robert T	CN2	San Diego	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
12	Clarke,Kyle D	CN2	San Francisco	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
13	Boeing,Chris J	INT	San Francisco	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
14	Keeva,Amy B	SR1	San Francisco	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
15	Flubber,Jason S	AD	San Francisco	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
16	Shepherd,Robert D	MAN	Seattle	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
17	Cornkite,Kristin Kelly	CN1	Seattle	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
18	Jones,Justin S	INT	Seattle	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
19	North,Benjamin J	SR1	Salt Lake City	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
20	Flight,Jeffrey J	CN1	Salt Lake City	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
21	Dog,Kevin R	MAN	Portland	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
22	Bullet,Scott M	SR2	Portland	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
23	King,Michael J	CN2	Portland	EMPL	Internal Audit	-	-	-	-	-	-	-	8	-	-	-	-	
24	Fox,Jnana	SR1	Portland	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
25	Fish,Jonathan I	SMR	Portland	EMPL	Risk Consulting -Technology	-	-	-	-	-	-	-	8	-	-	-	-	
26	Subtotal					-	-	-	-	-	-	-	48	96	-	-	-	
27																		
28	CTO,Floating Holiday																	

Now the administrator or Manager has the ability to quickly see how many billable hours by level are assigned to their project. With this information, they can see how that stacks up against the project’s budgeted billable hours and if there are enough resources reserved to complete the project on the expected timeline. It is critical that a Manager be able to see if he has reserved the right resources for his project too. In other words, a manager may say, “Jeff has to be on this project.” Well, if Jeff is not scheduled on the manager’s project, he will want to change that or another manager has access to pick Jeff up. It also allows Managers to see who is taking CTO and when. With this information, they can better staff their projects to ensure that the engagement is completed on time and in budget. Please refer to assumptions #2 and #3 below to see how the macro handles reserved / tentatively scheduled hours (denoted with an “R”) versus regular hours.

The next portion of the summary is the Chargeable Hours Summary, which appears in the report as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	NAME	GRADE	LOCATION	TYPE	SERVICE LINE	07/20	07/27	08/03	08/10	08/17	08/24	08/31	09/07	09/14	09/21	09/28	10/05	
189	CHARGEABLE HOURS SUMMARY																	
191	Chargeable Hours - Firm					568	536	428	460	500	544	464	378	460	460	452	352	
192	Chargeable Hours - Tentative					134	102	116	118	120	120	126	152	144	150	158	14	
194	Gross Chargeable Hours					702	638	544	578	620	664	590	530	604	610	610	366	
195	Less: Overbooked Chargeable Hours					-	-	-	-	-	-	-	-	-	-	-	-	
197	Net Chargeable Hours					702	638	544	578	620	664	590	530	604	610	610	366	

This is the 30,000 foot view of the chargeable hours for the region being analyzed.

Digging a little deeper, the summary also generates net chargeable hours by level (Consultant, Senior, etc.). The following is a screen shot of this summary:

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NAME	GRADE	LOCATION	TYPE	SERVICE LINE	07/20	07/27	08/03	08/10	08/17	08/24	08/31	09/07	09/14	09/21	09/28	10/05
NET CHARGEABLE HOURS - DETAIL																
Net Chargeable Hours (Consultants)					240	216	192	200	200	240	232	200	240	240	240	120
Number of Persons (Consultants)					6	6	6	6	6	6	6	6	6	6	6	6
Avg. Net Chargeable Hrs (Consultants)					40.0	36.0	32.0	33.3	33.3	40.0	38.7	33.3	40.0	40.0	40.0	20.0
Net Chargeability % (Consultants)					100.0%	90.0%	80.0%	83.3%	83.3%	100.0%	96.7%	83.3%	100.0%	100.0%	100.0%	50.0%
Net Chargeable Hours (Seniors)					200	200	150	120	160	160	144	136	160	160	160	120
Number of Persons (Seniors)					5	5	5	5	5	5	5	5	5	5	5	5
Avg. Net Chargeable Hrs (Seniors)					40.0	40.0	30.0	24.0	32.0	32.0	28.8	27.2	32.0	32.0	32.0	24.0
Net Chargeability % (Seniors)					100.0%	100.0%	75.0%	60.0%	80.0%	80.0%	72.0%	68.0%	80.0%	80.0%	80.0%	60.0%
Net Chargeable Hours (Managers)					158	118	98	154	156	160	118	98	100	106	106	46
Number of Persons (Managers)					5	5	5	5	5	5	5	5	5	5	5	5
Avg. Net Chargeable Hrs (Managers)					31.6	23.6	19.6	30.8	31.2	32.0	23.6	19.6	20.0	21.2	21.2	9.2
Net Chargeability % (Managers)					79.0%	59.0%	49.0%	77.0%	78.0%	80.0%	59.0%	49.0%	50.0%	53.0%	53.0%	23.0%
Net Chargeable Hours (Directors)					104	104	104	104	104	104	96	96	104	104	104	80
Number of Persons (Directors)					3	3	3	3	3	3	3	3	3	3	3	3
Avg. Net Chargeable Hrs (Directors)					34.7	34.7	34.7	34.7	34.7	34.7	32.0	32.0	34.7	34.7	34.7	26.7
Net Chargeability % (Directors)					86.7%	86.7%	86.7%	86.7%	86.7%	86.7%	80.0%	80.0%	86.7%	86.7%	86.7%	66.7%
Net Chargeable Hours (Total)					702	638	544	578	620	664	590	530	604	610	610	366
Number of Persons (Total)					19	19	19	19	19	19	19	19	19	19	19	19
Avg. Net Chargeable Hrs (Total)					36.9	33.6	28.6	30.4	32.6	34.9	31.1	27.9	31.8	32.1	32.1	19.3
Net Chargeability % (Total)					92.4%	83.9%	71.6%	76.1%	81.6%	87.4%	77.6%	69.7%	79.5%	80.3%	80.3%	48.2%

Under this summary, the user is able to quickly see what forecasted chargeability by level is. Generally, the difference between 100% forecasted chargeability is due to either CTO or a Company Holiday. Please refer to assumptions #4 below to see how the macro categorizes each level (e.g. CN1, CN2 = Consultants).

The next section of the summary are the hours assigned to the Non-chargeable projects. These categories must be noted on the Home Page worksheet. The following is a screen shot of this summary:

NAME	GRADE	LOCATION	TYPE	SERVICE LINE	07/20	07/27	08/03	08/10	08/17	08/24	08/31	09/07	09/14	09/21	09/28	10/05
Non-Chargeable Hours - DETAIL																
CTO Floating Holiday					-	72	128	40	40	-	40	-	-	-	-	40
External Training					-	-	-	-	-	-	-	-	-	-	-	-
Internal Trng/Staff Dev					-	-	-	40	-	-	-	-	-	-	-	-
Proposal/Practice Devel					-	-	-	-	-	-	-	-	-	-	-	-
Company Holiday					-	-	-	-	-	-	48	96	-	-	-	-
Other Time Off					-	-	-	-	-	-	-	-	-	-	-	-
Seminar & Conference					-	-	-	-	-	-	-	-	-	-	-	-
PRO - ACE/PeopleSoft Alliance					-	-	-	-	-	-	-	-	-	-	-	-

This is important for the user so that they can track reasons why their region is not staffed 100% billable if there are indeed legitimate reasons to explain the discrepancy.

Finally, the report summarizes who is “on the bench” or unassigned to a billable or non billable category. It is from this list that Managers can pick to staff their projects with. It is ultimately the HR administrator’s responsibility to work with each office in the region to ensure that each employee is staffed on a project (preferred billable, but if not a non billable project).

NAME	GRADE	LOCATION	TYPE	SERVICE LINE	07/20	07/27	08/03	08/10	08/17	08/24	08/31	09/07	09/14	09/21	09/28	10/05
Unassigned Hours - DETAIL																
White, Jay P	CN1	San Diego			-	-	-	-	-	-	-	-	-	-	-	40
Johnson, Daniel B	MAN	San Diego			8	-	-	8	8	8	8	6	8	8	8	40
Johnson, Robert T	CN2	San Diego			-	-	-	-	-	-	-	-	-	-	-	40
Clarke, Kyle D	CN2	San Francisco			-	-	-	-	-	-	-	-	-	-	-	40
Keeva, Amy B	SR1	San Francisco			-	-	10	-	-	-	-	-	-	-	-	-
Flubber, Jason S	AD	San Francisco			16	16	16	16	16	16	16	8	16	16	16	40
Shepherd, Robert D	MAN	Seattle			12	12	-	12	12	-	-	-	12	12	12	40
Bones, Jay E	SMR	Seattle			22	22	22	26	24	24	26	40	40	34	34	34
Dog, Kevin R	MAN	Portland			-	-	-	-	-	8	-	40	40	40	40	40
Fox, Jnana	SR1	Portland			-	-	40	40	40	40	32	40	40	40	40	40

Assumptions

The macro makes the following assumptions:

- 1) Staffing Schedule
 - a. The macro assumes that there is no more data after it comes across the first blank row in the "Staffing Schedule" sheet
 - i. The user is told in the instructions that if they receive an incomplete output, to check to make sure that there are no blank rows in the data.
- 2) Engagement Names
 - a. If there are any reserved hours (denoted by "R"), then keyword "(Reserved)" is appended to the engagement name.
 - b. If an engagement has both regular and reserved hours, then two engagement names are created, one without "(Reserved)" and one with it. This allows segregation between regular and reserved hours.
- 3) Tentatively Scheduled / Reserved Hours
 - a. When calculating the tentative/reserved hours, if hour information in the cell has "R" as the last character, the macro assumes hours on those engagements are tentative/reserved hours
- 4) Categorizing By Level
 - a. CN1, CN2 = Consultants
 - b. SR1, SR2 = Seniors
 - c. MAN, SMR = Managers
 - d. All Others = Directors
- 5) The macro will not work if they delete or rename any sheets.

Learning and Challenges

This project was certainly no easy task. We faced many challenges that took a long time to resolve. We found ourselves spending a lot of time looking for answers from Google and also searching for tips from the firm's IT department. All of these resources were instrumental in completing this project. The one item that we realized we did not include was taking CTO and Company Holiday's into account when calculating net chargeability %.

Concepts used included:

- Loops
- If/Then statements, Case If
- Identification and manipulation of Cells, sheets and their properties
- Buttons
- Message Boxes
- Arrays

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While much of the code is built around cosmetic changes to an original file format, such alterations are still very helpful and informative, and ultimately worth utilizing automation to assist in. While both of us have struggled with understanding the VBA code this semester and getting comfortable with the syntactical command necessary to quickly write code on the fly, this project was extremely useful in continuing to develop such skills. Although we had to reach out to a few other people to help us create some of the code for this project, and while we both feel our skills are still pretty limited, we have enjoyed the challenge and struggle of trying to understand and interpret VBA and create something worthwhile.

This project not only help us sharpen the tools that were given over the course of this semester, but being able to watch others in their projects also added to the vision of seeing the breadth of application VBA code can have to day to day functions. Thank you for a great semester of learning, and for making class time with such a challenging subject enjoyable and lighthearted.