User Manual
Automated Event Scheduling Assistant

version 3.0
Welcome to AESA R3

Welcome to AESA R3 your Automated Event Scheduling Assistant. AESA combines integrated data storage, powerful functionality, and an easy to use point and click interface to provide the most comprehensive scheduling product in the event scheduling market.

AESA is integrated. AESA collects all the information you need to run a schedule including information about employees, events, proposed schedules, and actual work hours.

AESA is automated. AESA electronically imports required shifts, employee availability, and personal information and then automatically creates a schedule based on your organization’s policies and rules. The actual hours worked can also be transferred directly to your payroll system to minimize your data input time.

AESA is easy to use. AESA’s point and click interface ensures that the data and functions you need are only a few mouse clicks away. AESA has been designed with the scheduler in mind, to combine powerful functionality with ease of use and flexibility required for the scheduling task.
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Part 1: Introducing AESA

Part 1 will introduce AESA R3, provide you with a model of the scheduling process that AESA uses, and provide you with some guidance as to initial settings for AESA. The topics covered in this section include:

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Introduction

**AESA R3** combines Relational Database technology and Visual Basic programming to provide customized performance and excellent reliability for your scheduling challenge. **AESA** has been designed with the scheduler in mind, to act as an assistant for many of the routine tasks involved in developing employee schedules. These routine tasks include:

- Collecting and organizing employee availability
- Matching employees with required shifts
- Editing the working schedule
- Producing scheduling reports
- Transferring hours worked to other systems such as Payroll

At the heart of **AESA** is an integrated database that has been optimized for the unique storage requirements required by scheduling. While optimized for data storage, the database design is flexible enough to adapt to a variety of scheduling environments. Unlike competitive programs that expect organizations to adapt to their way of scheduling, **AESA** has been designed to adapt to your organization’s scheduling process. Infomax has created a design that enables **AESA** to be customised for your organization. **AESA R3** can deliver performance improvements to your current scheduling process with little disruption to the way your organization currently schedules.

How can we do it? In a word, experience. Infomax has been developing and testing **AESA** in real world scheduling environments for over 5 years. Our experience helps the design team understand scheduling from a scheduler’s perspective and enables Infomax to continuously adapt and improve **AESA**’s design. We work closely with schedulers to make the program easier to use, and more importantly, easier to understand. With the release of **AESA R3**, we believe we have produced the most powerful event scheduling product in the market that is also the easiest to use!

But don’t take our word for it. Browse through this manual and look at the features. Integrated data storage, powerful operations, and an easy to use point and click interface. **AESA** stores employee information and availabilities; keeps track of the initial schedule; the working schedule, and tracks hours actual worked. **AESA** schedules based on your organization’s scheduling rules and enables you to edit the working schedule in real time. **AESA**’s Resource Center enables you to import and export data minimizing data input. And **AESA**’s Report Center provides your organization with customized reports, reports that your organization designs and uses. Anyway you look at it; **AESA** is a product that will improve your scheduling process.
The AESA R3 Process Model

AESA has been designed using a scheduling process model. Whether your organization uses some or all of the steps shown in this model, AESA will be adapted to your organization’s scheduling process. The process model acts as a glossary for the terms we will be using in the manual. In addition, a glossary of terms is provided at the end of the manual for those who prefer a more traditional approach.

There are five basic steps in the process model. The process is described below and displayed in Diagram 1-1 below.

1. *The scheduling process begins with information about employees and events that need to be scheduled.* Employees have personal information, skills, seniority, and belong to an employee group. Each employee has a set of availabilities that identify when the employee is available to work. This information is entered into AESA’s Employee Center (either automatically through import or by data input).

2. *At the same time as employee information is collected, information about events is also being collected.* Events have a date, a time, and a manager. Every event also has a set of shifts attached to the event. A deployment sheet is a list of all the shifts associated with an event. Deployment sheets can be automatically imported into AESA.

3. *When employee and event information have been updated and collected for the next scheduling period, the schedule is ready to be created.* AESA use the rules defined in the customized scheduling algorithm together with employee information and event deployment sheets to assign available employees to open shifts. The initial schedule is created.

4. *Changes occur to the initial schedule throughout the scheduling period.* The initial schedule becomes the working schedule and AESA provides traceable edits to the working schedule. All edit can be viewed in the Employee Center.

5. *Once the event occurs, the working schedule is frozen and the scheduled hours are used as the forecast for hours actually worked.* These hours can be edited based on actual work times observed during the event. Once edited, these worked hours can then be automatically transferred to the payroll system.

### Diagram 1-1: AESA Process Model

![Diagram 1-1: AESA Process Model](image)
Initial Settings for Dates and Times

*AESA R3* has been tested for year 2000 compatibility. To ensure that all operations in *AESA* are fully compatible, it is necessary to check your machine’s settings for default times and dates. You can check your settings using the “Control Panel” available from the “Settings” option on the Windows 95, 98, or NT “Start” button. To access the “Control Panel”, first click on the Start Button and move the cursor up to highlight “Settings”. Under the Settings option, you will be given a choice of folders. Choose the “Control Panel” (as shown below).

Selecting the Control Panel will provide you with a long list of items that help define your computing environment. These include items such as “Add New Hardware” or “Add/Remove Applications”, “Date and Time” and many more. The first thing to do is to make sure the date and time on your machine are set correctly. To do this double click on the icon labeled “Date and Time”.

1. Double Click this Icon
2. Click on correct date
3. Type in correct time.
4. Click “Apply” and then “OK”
Now the time and date are set correctly, you must also specify the format that will be used to view the date and time. There are three settings that need to be checked. These are: (1) Regional Settings; (2) Time Format Settings; and (3) Date Format Settings. To specify the formats for these times and dates, find the icon labeled “Regional Settings” in the Control Panel. ” Double Click on the “regional Settings” icon and a new window is opened. The process for changing the settings is described below. Once these settings are correct, AESA is ready to use.

1. Double Click Regional Settings Icon
2. Click on “Regional Settings” tab and Select English (United States) option as shown in diagram.
3. Select “Time” Tab and type in Time Style box “HH:mm:ss” as shown in diagram.
4. Select “Date” tab and then type “MM/dd/yy” into the “Short Date Style” box as shown in diagram.
AESA R3 has been organized into four functional areas. These areas are all accessible from AESA’s Control Center. The Control Center is shown below in Diagram 1-2. The four functional areas are: the Employee Center, Scheduling Center, Resource Center, and Report Center.

Diagram 1-2: AESA Control Center

The Control Center is a good demonstration of AESA’s simple and effective design. There are only four options to choose from in the Control Center. Placing the mouse over any one of the buttons provides you with a description of the functions that Center provides. There are no confusing menu options, and no icons cluttering the interface. The clean and simple interface provides efficient access to the data and functionality that schedulers need to create and edit schedules.

This User manual is organized around the four Centers noted above in Diagram 1-2. The manual will step through each of the Centers and explain the features provided within each Center. Part 2 will focus on the Employee Center and the data that can be viewed with this center. Part 3 will focus on the Scheduling Center and the operations that can performed in that center. Part 4 will explain the import and export capabilities available in the Resource Center. Finally, some examples of customized reports available in the Report Center will be provided in Part 5.