

User Instructions for the Excel Year Planner for Excel 2013, 2016, 2019, Office 365

Version 7.10

Contents

1	Introduction	2
2	Brief Overview of the Most Important Points	3
3	Installation	4
3.1	Setup	4
3.2	First Start / Prepare Planner	5
4	Register new employee	7
4.1	Employee column	7
4.2	Tips for sorting	8
5	Enter absences	10
5.1	Absences for Part-time Employees	10
5.2	Adjust Absence Type	10
5.3	Insert Legend	12
5.4	Add comment	13
6	Program Settings	14
6.1	Color weekends	14
6.2	Administration Rights	14
6.3	Actions when entering an absence	15
6.3.1	Automatically update annual statistics when a leave is entered	16
6.3.2	Do not color cells for weekends and holidays	16
6.4	Other Program Settings	17
6.5	Recommend write protection	17
6.6	Holidays	18
6.7	Calendar week	18
6.8	Allow copy/paste from other workbooks.	18
6.9	Column width of the individual days	18
7	Absence Statistics	19
8	Define Personal Settings	20
8.1	Visible Columns	20
8.2	AutoFilter	20
9	Printing	21
9.1	Create PDF	22
10	Create annual overview	23
10.1	Create annual overviews for all employees	23
11	Other tools	25
11.1	Fix header rows	25
11.2	Re-draw grid lines	25
11.3	Hide weekdays	25
11.4	Realign all comments	26
11.5	Enter recurring leaves	26
11.6	Create Mail Merge with Word	27
11.7	Protect Workbook – only change with password	27
12	Adjust Planner for a New Year	29
13	Import Data	29

14	Formulas for Resource Planning	30
15	Clean Up and Repair Data	31
15.1	Clean up	31
15.2	Repair Calendar	32
15.3	Refill Absence Text Entries	33
16	Troubleshooting	34
16.1	Problem: Add-in does not load	34
16.1.1	Disabled Items	34
16.1.2	COM-Add-Ins	35
16.2	Activate Logging – Info only for IT-Administrators	36
16.2.1	Entering Environmental Variables manually	36
16.2.2	Entering environmental variables with PowerShell command	36
16.3	Activate the LeavePlanner Logging (only for IT-Administrators)	37
16.4	Temporarily Disable Add-in, Start Behavior of the Add-in Only for IT-Administrators	37
17	System Requirements	38
18	Contact	38

1 Introduction

The holiday and absence calendar gives you a fast overview of the absences of all employees or of a department or team at any time. Holidays (leave), days in lieu, sickness and accident days, courses and more can be recorded here. In contrast to Outlook, a whole year can be shown on one sheet in the annual planner. The employees generally enter absences themselves. One cell (version A) or two cells (version B) are available for each day. A new entry can be created with just a few clicks. The display can be individually configured for each user through the use personal AutoFilters. The LeavePlanner is also suitable for use with small teams with only a few employees or for a whole department.

The annual planner can also be used as a simple stand-by or duty roster.

Features:

- Clear display with colored bars, weekly divisions and comments.
- Start date can be freely selected. (A school year can be shown instead of the calendar year).
- Saturdays, Sundays and holidays are highlighted in color. Mondays and Fridays can also be highlighted from Version 7 onwards. (This can be disabled).
- The LeavePlanner can be adapted to the following year with only a few clicks.
- Holidays can be freely entered. There is also an assistant available which can be used to enter religious and national holidays.
- Each user can define the AutoFilter and the visible columns individually.
- When the LeavePlanner is opened, the current day is selected in the «home row».
- Program-supported addition and deletion of personnel.
- Two operating modes: Either all personnel have administrator rights or only a few individuals manage the LeavePlanner. A read-only password can also be issued.
- Each user can only change his or her own “home row” in restricted mode. This is a safeguard to prevent leave days being accidentally entered for a work colleague.
- Statistics of the entered absence days by type of absence. This is on an annual basis by default, but any periods can be selected.
- The texts and colors for the types of absence can be adapted to individual requirements. Max. 12 or 24 different types of absence. (Depending on template used).

- Annual overview per employee that will fit on a single letter-size sheet.
- Assistant to optimize the sheet for printing, select the time range, hide Sat., Sun if required, set zoom factor, calculate statistics.
- LeavePlanner can also be saved simply as a PDF file.
- Data can be imported from Version 6.x and 7.x.
- Assistant for entering recurrent (weekly) absences
- Resource planning / resource overview

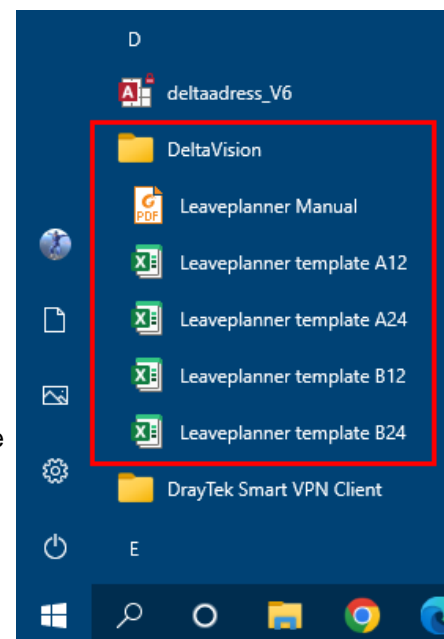
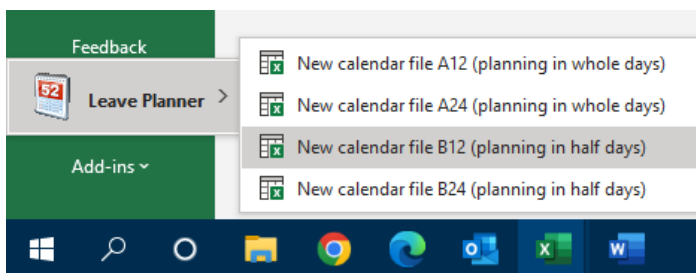
2 Brief Overview of the Most Important Points

The LeavePLanner consists of an **Excel file** and the holiday calendar **software**. You can choose from four different templates:

- 12A = max. 12 absence types, 1 cell per day
- 12B = max. 12 absence types, 2 cells per day (planning precise to half a day)
- 24A = max. 24 absence types, 1 cell per day
- 24B = max. 24 absence types, 2 cells per day (planning precise to half a day)

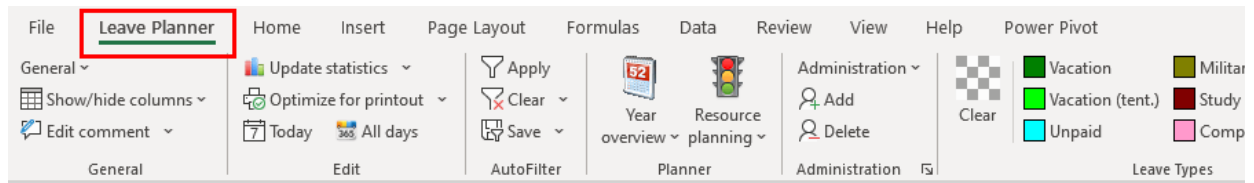
The advantages and disadvantages of the two types are explained in Chapter 5, *Enter absences*

- The Leave Planner templates can be found at **File / Add-Ins / Leave Planner**.
Caution: Some newer versions of Office do not show the menu item. You can also find the template directly from the Windows start menu.



Open the Group **DeltaVision** in Windows 10 and then D, and the leave planner template can also be found there.

- There are two modes of operation: All users can manage the LeavePlanner (default), or only individual "LeavePlanner Administrators" may configure users. There is more information about this in Chapter 6.2 *Administration* from Page 14.
The initial administrator password is *deltavision*.
- **All functions** can be found in the «**Leave Planner**» ribbon



- Most cells are protected so that the Planner is not accidentally “corrupted”. To register additional employees in the Leave Planner, you must first open the row for the employee via the **Add** icon in the **Administration** group. (Register new employee *Chapter, page 7 onwards*)
- Existing entries are deleted by the grey and white icon, holidays, unpaid leave, military service, course etc. are entered with corresponding colors. First highlight the days and then click the icon.
- If you highlight several days where these are separated by a holiday or a weekend, the weekends (highlighted in orange) are not colored. If you wish to enter an absence on one of these days despite this, then highlight only one single cell and then click the absence icon.
- Sort: Do not use the standard Excel function, use instead the command under **Administration / Sort employees**.
- You do not need the password to remove the sheet protection in the standard application; if a password request appears, this implies a mistake on the part of the operator. The exception is if you wish to add further additional columns yourself. If this is the case, contact us and you will then receive the password and other information regarding adapting the planner.

3 Installation

3.1 Setup

There are two different setups for the installation, **AdminSetup** and **UserSetup**. You can find all the information about the setups in a separate document. (Link at the end of the chapter).

The annual planner is generally first prepared by one person (enter all employees, make program settings, enter license number etc.) and then copied onto a network drive to make it available to all employees.

Important: even if the Excel file itself is made available to all employees, the software must be installed on every employee PC for the planner to function correctly. Only then will the LeavePlanner menu ribbon be displayed.

You may install the software on as many PCs as you wish; the license relates only to the maximum number of employees that can be recorded in the yearly planner.

Tip:

If only a small number of people may make entries, but many people need access to see the planner, this is easiest to arrange via the rights in the File system. Create a folder in the network drive where the planner is to be stored. Give all employees reading access rights but only assign writing/deletion rights for the folder to the “planner administrators”.

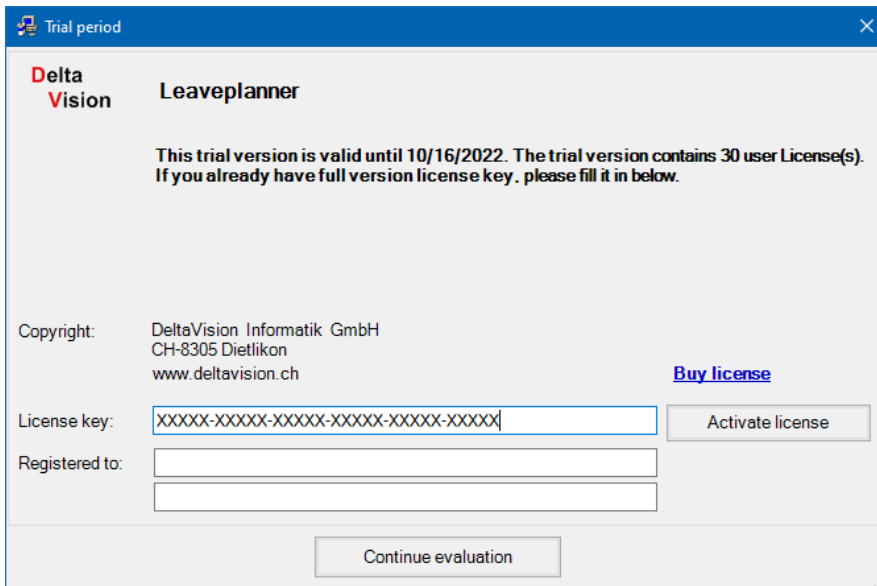
In the planner, you can then leave the option “*All users are calendar administrators*” enabled.

Further information on installation and granting of rights can be found in this document:

https://www.excel-leave-planner.com/files/support/LeavePlanner7_Installation.pdf

3.2 First Start / Prepare Planner

Now open the planner. A dialog box will open for entering the license number.

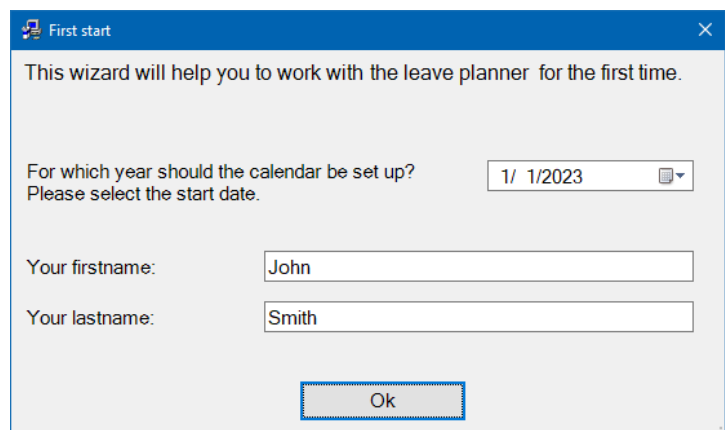


You can test the planner with full functionality for 30 days. Up to 30 employees can be registered for the test. The number of employees for the full version depends on the license purchased. There is otherwise no difference to the trial version.

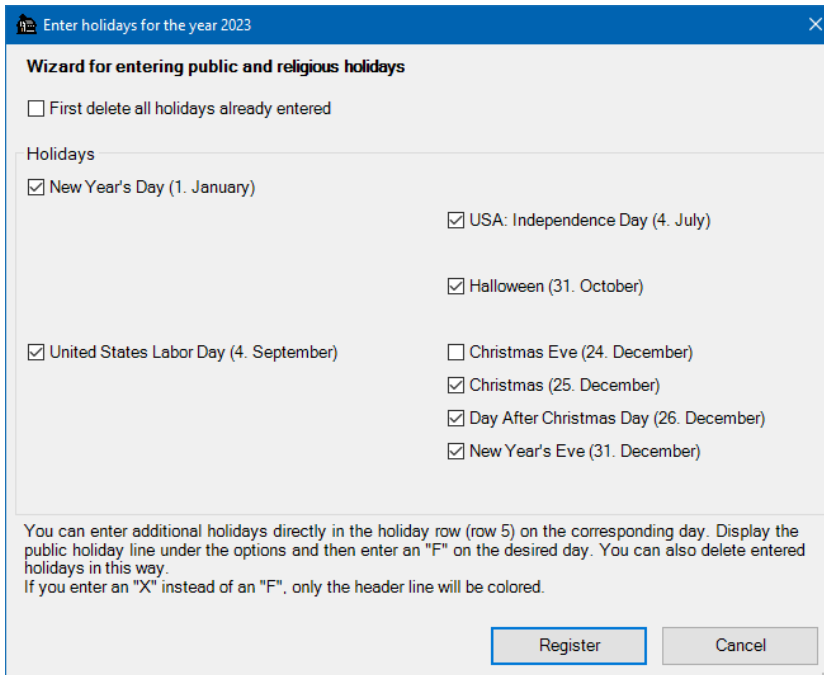
If you have already purchased a license, please enter the license number and the two lines of the license holder and then click **Activate license**. If you do not yet have a license number, click the **Continue evaluation** button.

If this dialog box does not appear, then either you already have a full version or Excel still needs to be configured for use of the Leave Planner. In any case, the **“LeavePlanner”** ribbon should now be visible to the left of the “Start” symbol bar. If this is not the case, please refer to the instructions in Chapter 16 *Troubleshooting from page 34 onwards*.

At the first start, a small wizard will appear which registers you immediately as an Administrator in the planner.



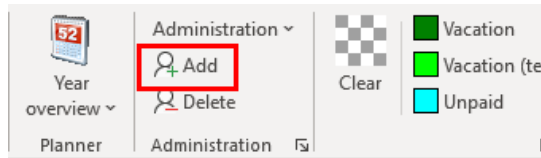
In the second step you can enter the desired holidays. The assistant calculates the religious holidays for the selected year automatically. How you can enter regional holidays is described in *Chapter 6.6 Holidays on page 18* The holidays assistant can also be called up later.



Finally, another dialog box with the most important information is displayed.

4 Register new employee

You must now first register the employees. Click on the first empty row directly below the column headings or below the last person already entered. (It makes no difference whether you select the whole row or only one individual cell).



In the **Leave Planner** ribbon select the command **Add**. A new row is added.

If you have already registered some employees and wish to subsequently insert a row, just highlight the desired row and then select the command **Add**. The existing rows are shifted *downwards*.

Tip: If you wish to add several persons at the same time, select as many rows as people you wish to add.

Now fill in the individual cells. For small companies, it could be that only the team is entered, but not the organizational unit. The employee number and grade are certainly cells that are only needed in bigger companies. The general rule is to fill out the cells that you need. The name must be filled out though. **Make sure that there are no completely empty rows in your list. If you do, the AutoFilter and Sort functions will no longer work correctly. The software assumes that the list ends at the first empty row.** (If you want an empty row for purposes of separation, you can just place a ~ or other symbol in this row only under Name).

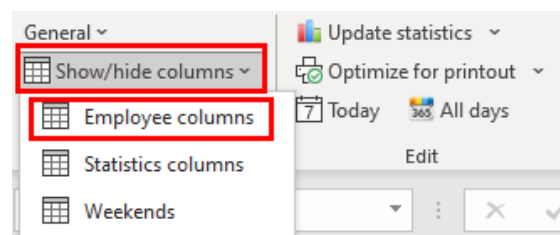
You can format the cells as you wish to show, e.g., which team an employee belongs too or to emphasize the team leader (colors, bold text, italic text, font size etc.).

The Planner knows different absence types, where the rubrics “*Holidays*” and “*Leave*” always form the first absence type and have additional columns. Usually, we are interested not in the number of leave days already taken but in the number of leave days remaining. So that this can be calculated, please enter for all employees the starting credit at the start of the *Year* and any days from the *Previous year*. For a part-time employee, fill in the value multiplied by the appropriate fraction of full-time equivalence. (e.g., 20 days leave is standard. For an 80% (0.8 FTE) employee, only 16 days would be entered)

4.1 Employee column

Under **Show/hide columns / Employee columns** you can show or hide the required employee columns as you wish.

The software notes the settings for each user individually.



Team and OU (Organization Unit or Department) columns

These two columns are primarily used if there are a lot of employees being managed in the planner. This makes it easier to group, sort and work with the AutoFilter.

Tip: You can change the column headings and so use the column for something else entirely.

Grade column

The grade, or rank, of the employee (employee, supervisor, head of department etc.) can be recorded in this cell. If there are many employees, this column can help in sorting the list. (See also tip about this below). Otherwise, this cell has no significance.

Tip: You can change the column heading and so use this column for something else entirely.

Employee number column

This cell is provided for future extension possibilities. At the moment, it is for information only and is generally not filled out.

Tip: You can change the column heading and so use this column for something else entirely.

Login column

The login details of the employee (PC sign-in details) are entered here. If you are unsure what your log-in is, you can look it up in the menu **Administration / Show login**.

This information must be present if the leave planner is being used in protected mode. Read more about this in *Chapter 6.2 Administration*.

The login is also needed by the software in "All users have admin rights" mode in order for it to automatically select "your" row when the planner is opened.

FTE Column

Enter the full-time equivalence of the employee in this column (per cent employment). The value is for information only.

Admin Column

An **x** must be entered in this column for all persons who are the Leave Planner administrators. (Something else could also be entered; as long as the cell is not empty, the employee will be given the status "Planner-Administrator"). Only a small number of people should be planner administrators.

Reserve1 to Reserve3 Columns

You can use these columns as you wish. The column name *ReserveX* may be overwritten. If you do not need these columns, just hide them.

4.2 Tips for sorting

You can generally add people directly at the "right" place. However, it is often easier to record all personnel first and then sort them afterwards. The *Grade* column was created specifically for this case. You can define the hierarchy level here.

Example:

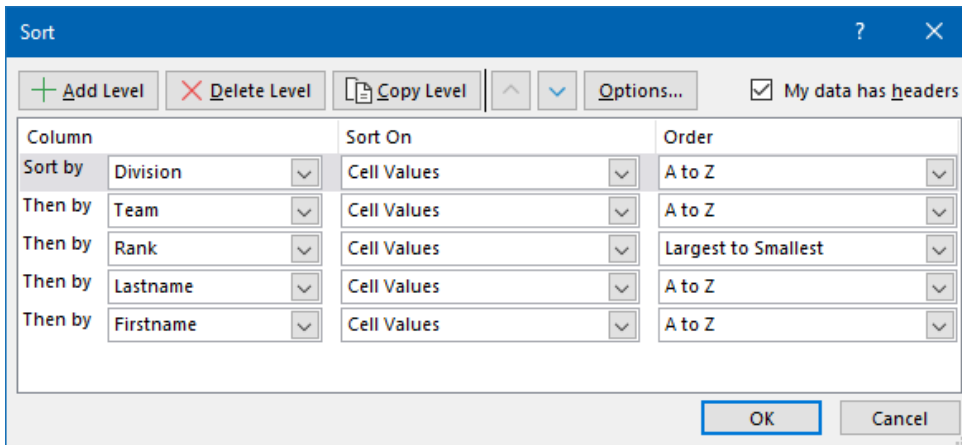
Employee = 0

Team leader = 1

Head of department = 2

If you manage a lot of employees in the Leave Planner, you will probably also use the OE column (organization unit or department). If you enter, e.g., a "~" in the Team column, sorting will be easier. (This symbol comes first in sorting, even the letter "A").

- Now click on any cell within the planner, e.g., the first name.
- Now select from the command **Administration / Sort employees...**



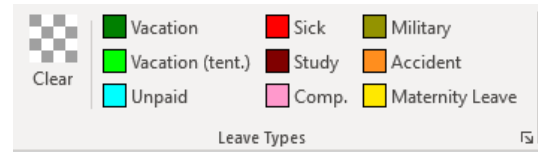
- Ensure that the option “My data has headers” is enabled.
- If you select the order of sorting as above, you will have grouped employees according to department and team. Furthermore, the team leader for every team will be first, followed by the team members in alphabetical order.

Note: The sort criteria can be changed any way you wish.

5 Enter absences

To enter an absence, e.g., "Vacation", proceed as follows:

- Highlight the days concerned.
- Click the appropriate icon in the symbol bar.



The highlighted area is colored and if necessary labeled. (If only a few days are highlighted, no text is added). You can always enter your own text or adjust the automatically added text though.

To delete cells already highlighted, use the first gray/white icon.

52	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue

52	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan	Jan
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue

The annual statistics are automatically updated when an absence is entered.

The statistics column for the remaining absence types can be shown via **Show/hide columns / Statistics columns**.

Balance	Total	Total	Total	Total	Total	Total	Total	Total
VL	VL	VT	UL	ML	SL	TL	PL	AL
4	19	5	0	15	10	4	2.5	6
20	0	0	0	0	0	0	4	0
15	5	0	0	0	0	0	3	0

Tip: Saturdays, Sundays and holidays are normally colored orange. In order to enter an absence on one of these days, only one cell may be highlighted.

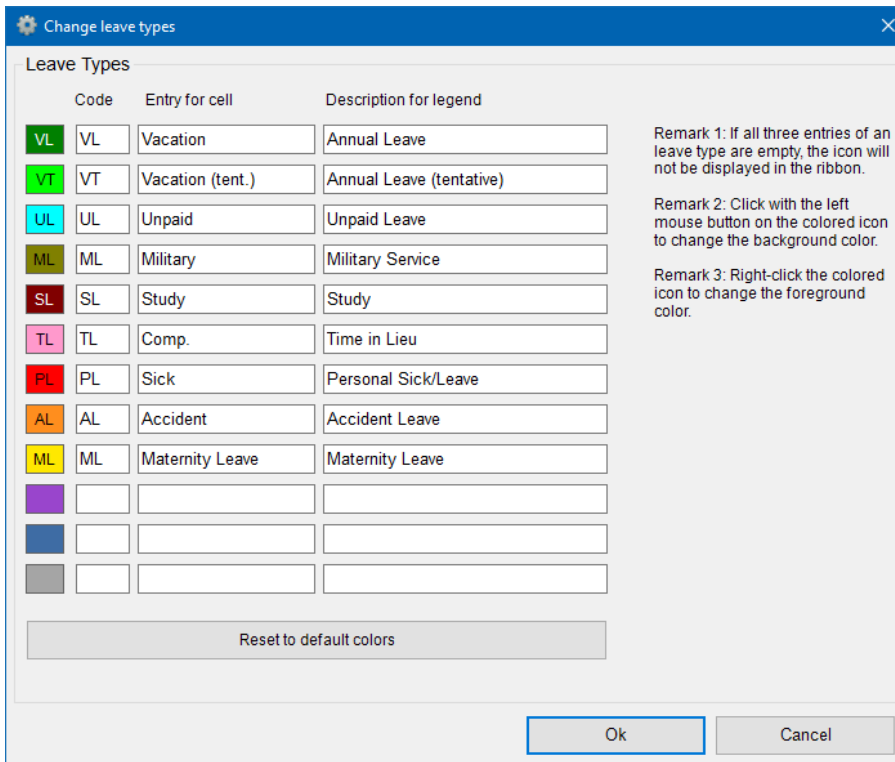
5.1 Absences for Part-time Employees

If a 0.8 FTE part time employee is on vacation for one week, then only 4 days (e.g., Mon-Thu) are entered as vacation days so that the calculation is correct. However, it would not be ideal if this does not show clearly for all employees whether the employee in question works on a Friday or is still on leave. To overcome this problem, create an additional leave type e.g., "Absent". Then just enter "Absent" on Friday. You will see in the next chapter how to create a leave type.

5.2 Adjust Absence Type



To change the leave types, click on the dialog box launcher in the bottom right-hand corner of the *leave types* group



The leave types given can be adapted to the requirements in your company. A maximum of 12 or 24 leave types are available. *If the 12 leave types should prove to be insufficient over the course of the year, you can use a new 24 template and import your current data.*

The first leave type should however only ever be used for vacation/holidays as a column for the starting credit, and another column for the remaining balance column are provided here for the statistics.

If you do not need all the rubrics, just leave the input fields empty and the icon will then be hidden from the toolbar.

Only planner administrators can change the rubrics.

To change the color of the leave type, click on the colored icon. A left click changes the background color, a right click changes the text color.

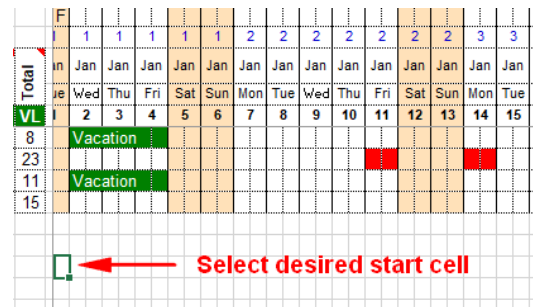
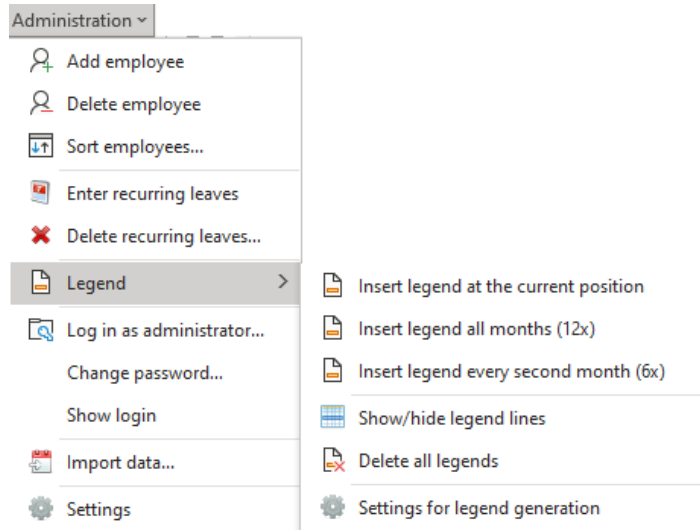
If you adjust the leave type and you have also indicated a legend, please remember to re-create the legends as this will not adjust itself automatically. Read how to do this in the next chapter.

5.3 Insert Legend

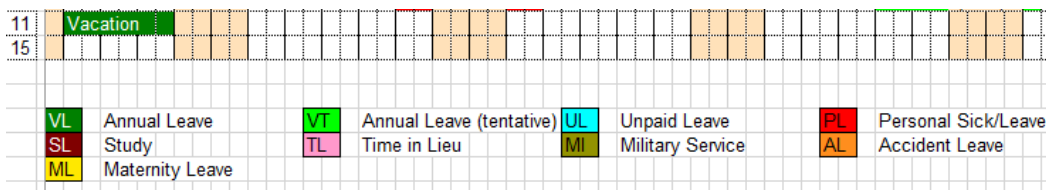
The legend is no longer static as in previous versions. You can insert legends at any day you wish. There is no limit to the number of legend blocks. The reason for this adjustment was that part of the legend was often cut off when printing (because one or several months were hidden). To resolve this problem, the legend can now be inserted at the optimum position before printing.

It is best to first delete all legends. (When deleting, it makes no difference where the cursor is).

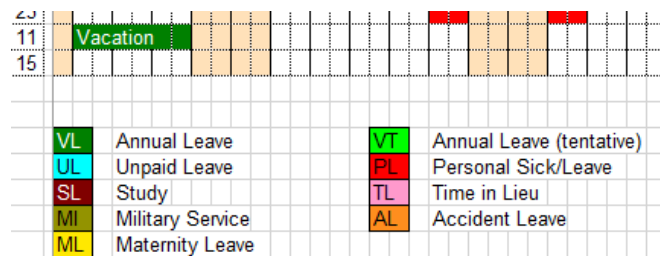
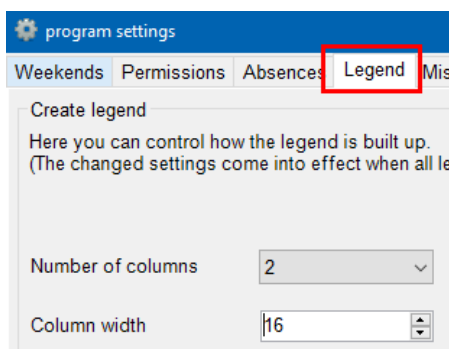
Then select the desired **start cell**. This must be exactly 3 rows below the last employee cell. It does not matter which column is selected.




Select the command **Insert legend at the current position**




If you would like to have more control over the number of rows and columns, you can disable the Automatic mode and specify the number of columns and the column width yourself.



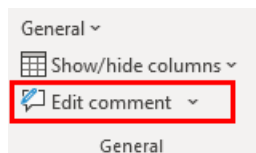
If you wish to automatically enter legends distributed over the whole year, either of the following commands can also be used.

 Insert legend all months (12x)

 Insert legend every second month (6x)

The start position does not need to be highlighted for this. The program automatically inserts the legend on the 1st of the month.

5.4 Add comment



You can also place a comment in any cell. As the sheet is protected, you cannot use the standard Excel function though, you must instead also add the comment via the leave planner menu.

If you do not enter any comment in the comment window, any comment already there will be deleted.

In the **General** menu, you can also see the commands **Delete comment** and **Show/hide all comments**

The size of the comment box can be changed either via the dialog or directly with the mouse. All comments must be visible.

Procedure:

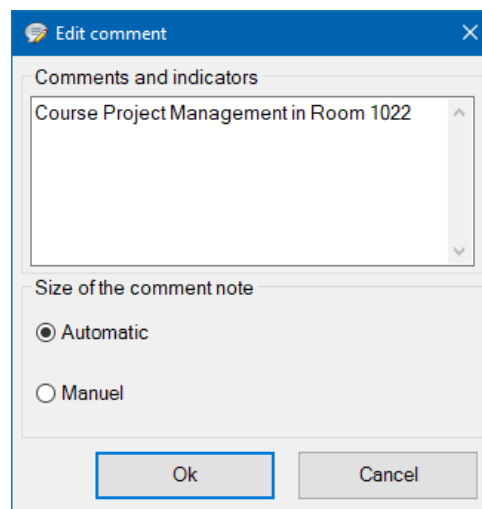
Via the menu

General / Show/hide all comments

First show all comments. Now you can edit the comment using the mouse as usual and change the size/position. Then hide the comment again.

Tip:

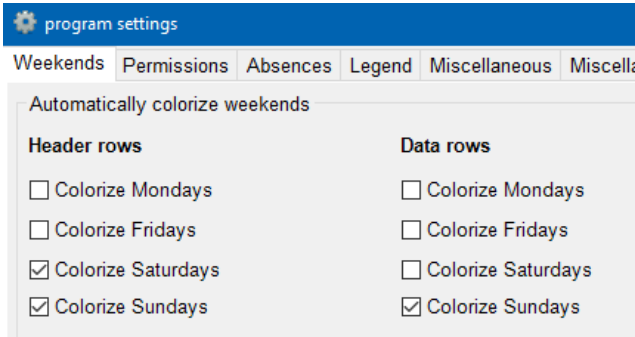
If you often work with the AutoFilter, it may happen that the comments are suddenly displayed some distance away from the associated cell. This can be rectified with a mouse click via the menu **General / Realign all comments....**



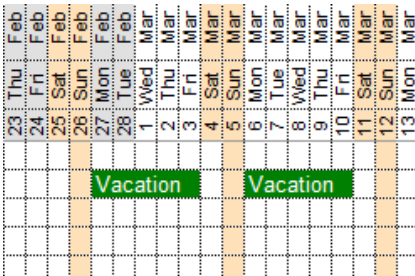
6 Program Settings

You access program settings via the menu item **Administration / Settings**.

6.1 Color weekends



Saturdays and Sundays are colored orange by default. In companies where there is also weekend working this can be an issue, as absences will not then be displayed. The “weekend formatting” covers up the absence. In this case, uncheck the box *Colorize Saturdays* or *Colorize Sundays*, as appropriate

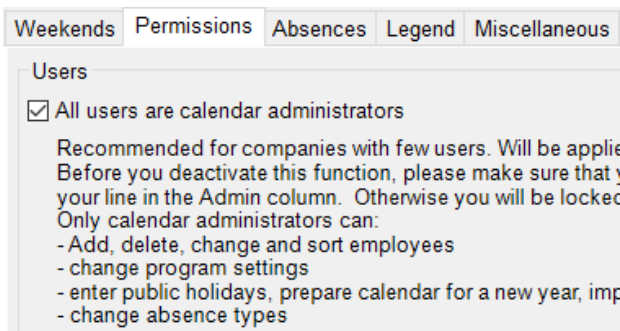


You can choose whether the orange highlight is only shown in the header area or over all rows.

Tip: If you only very rarely have to enter an absence on a Sat or Sun, you do not need to uncheck the colorization of weekends. You can also enter an absence on one of these “orange” days by highlighting just **one** cell and then clicking on the Absence icon. The absence will then be entered despite the weekend highlighting.

Note: For statistical purposes, the program counts only the number of colored cells. Normally, a Saturday or Sunday does not need to be taken as leave, so as a rule you should not enter leave here.

6.2 Administration Rights



The more people who make entries onto the planner, the greater the risk of something being entered incorrectly or in the wrong row. Preferences are also different and not everyone would choose the same sorting sequence or column width etc. if everyone then changed the presentation to suit themselves, this would be tedious for all involved. For that reason, it is recommended that if there are more than about 20 users, only a few people have administration rights. (Remember also substitutes for those on leave.)

Anyone who does **not** have administration rights can only change his or her “own” row. This means it is not possible to enter leave days for a co-worker. It also ensures that leave days are not accidentally entered on a co-worker’s row one above or below.

Functions that all users can carry out:

- Change AutoFilter, define personal AutoFilter. (This setting is individually saved for each user).
- Hide and show columns (this setting is individually saved for each user).
- Change his or her own data cells. (Enter absences, add comments, label and format cells).
- Print

Functions that only planner administrators can carry out:

- Add, delete and change users.
- Sort users
- Change program settings
- Enter holidays
- Adjust absence types
- Import data
- Prepare calendar for next year

If only a few people use the leave planner, it is simpler to grant administration rights to all users without a check. To do this, the **“All users are administrators”** box must be checked. (The *Admin* column is not then analyzed).

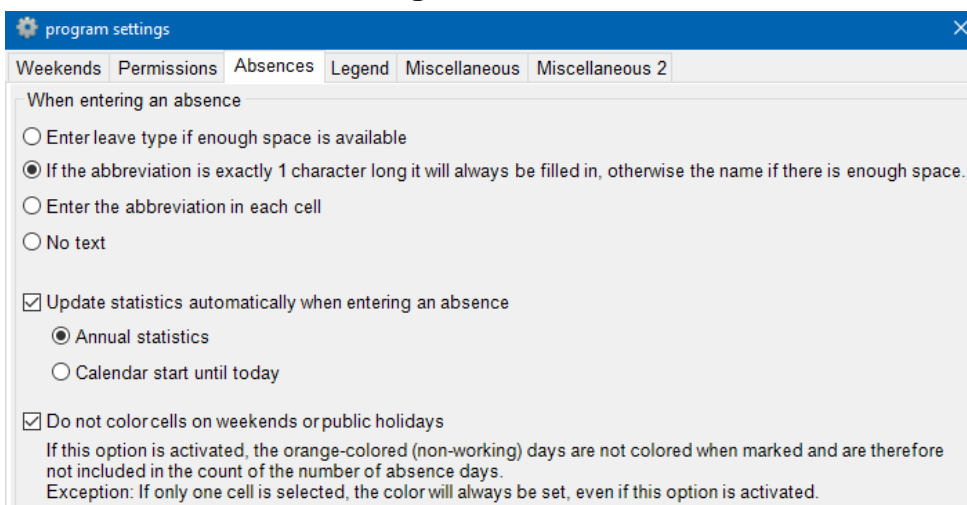
If many employees use the annual planner, two or several administrators should be nominated. Now it is important that all users (regardless of whether they are planner administrators or not) enter the right login details in the *Login* column. When the planner is opened, the software determines from the login details those rows in which changes may be made. An **x** must also be entered in the *Admin* column for administrators.

If you uncheck the **“All users are administrators”** box and have not yet entered any administrators (or the logins are missing), you will see the next time you start the planner that you have locked yourself out and no longer get to the corresponding dialog box either. Don't panic: Just select the **Administration / Log in as administrator** menu. The default password is *deltavision*. (The password can be changed via the menu).

Tip: It may be that you would like all employees to only see the data but not be able to change it. You can read here how you can also work only with the Fileshare rights or with a write-protect password:

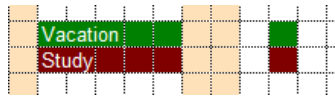
https://www.excel-leave-planner.com/files/support/LeavePlanner7_Installation.pdf

6.3 Actions when entering an absence

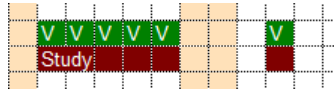


Below is one example of each of a whole week or one day only being highlighted.

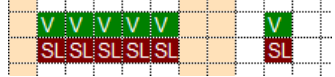
The abbreviation for a holiday/vacation is only one character long (V) and the abbreviation for the course (SL) two characters.



Enter leave type if enough space is available



If the abbreviation is exactly 1 character long it will always be filled in, otherwise the name if there is enough space



Enter the abbreviation in every cell

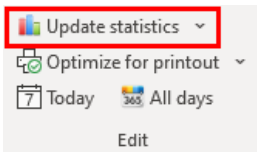


No text

6.3.1 Automatically update annual statistics when a leave is entered

In the calculation of the absence statistics, the total days is calculated using the cell color. Each time a leave is entered or deleted; the program updates the statistics. Since this process takes about 1 second on older PCs, it can also be switched off.

You can choose whether the annual statistics are produced, or only up to the current date.



The statistics can be created at any time for **all** employees using the command **Update statistics**.

The program settings determine whether you create annual statistics or those from the start of the planner to the current date depends on the program settings.

6.3.2 Do not color cells for weekends and holidays

In the following, we are assuming an organization where there is no working on Saturdays and Sundays. As stated, the statistics depend on how many cells are colored according to the leave type. If, for example, an employee has three weeks' vacation, then he or she will probably not highlight three weeks from Monday to Friday but highlight three weeks at once and click the green vacation icon. From afar, no difference is seen as the weekend color covers the green highlighting. If you now switch off the weekend colorization, the differences are clear to see. For the calculation of the leave days to be correct, the weekends (and holidays) must not be colored. The program offers support by only coloring the working days if the option is activated.

Planning 2023		Start	Balance	Total	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Lastname	Firstname	VL	VL	VL	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar	Mar
Smith	John	25	10	15					Vacation																				

Employee has entered 3 weeks' vacation, option was active

Planning 2023		Start	Balance	Total	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Lastname	Firstname	VL	VL	VL	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
Smith	John	25	10	15				Vacation																					

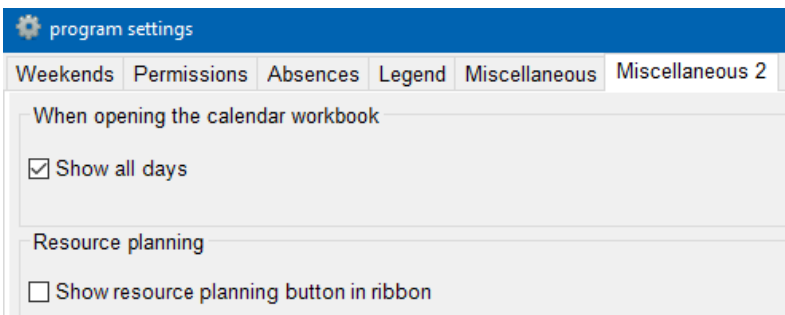
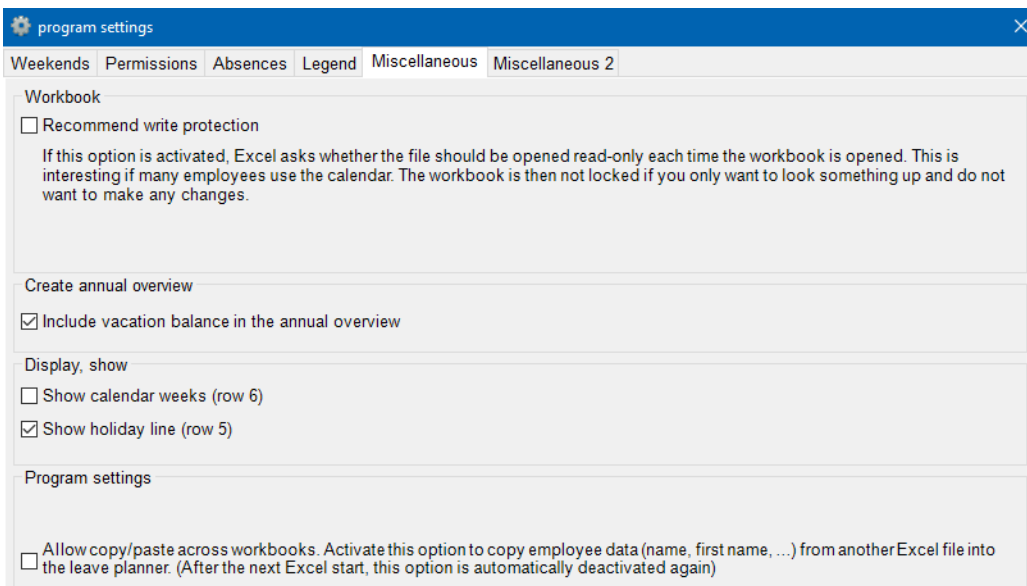
View when weekend highlighting is removed

Planning 2023		Start	Balance	Total	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27
Lastname	Firstname	VL	VL	VL	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
Smith	John	25	6	19				Vacation																					

Employee has entered 3 weeks' vacation, option was not active

Tip: To enter an absence even at the weekend, highlight only **one** cell and then click the vacation icon.

6.4 Other Program Settings



Show all days:

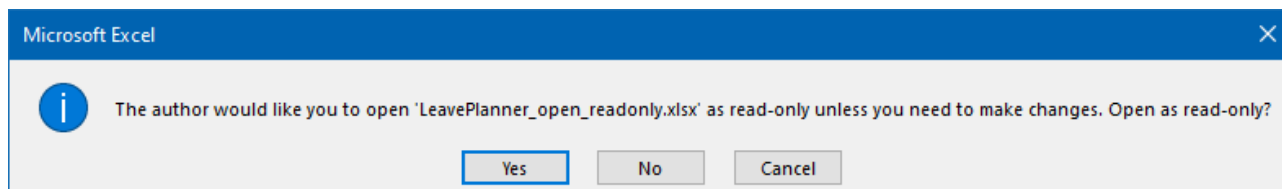
Tip: Disable this function if you also want Sat, Sun permanently hidden.

6.5 Recommend write protection

If a lot of users share the leave planner, this increases the probability that the planner is currently being blocked by another user when you wish to make a change. Only **one** person can make a change at any one

time. Often, you only want to look something up and not make any entries. In this case, the planner can be opened *read-only*. The planner is not blocked to other users by this. More will probably be looked up than entered by the management area in particular. If the planner is opened as read-only, this does not disturb anyone else.

If the “Recommend write protection” box is checked, the user is always asked whether the planner is to be opened as read only. Activate this function if more than about 20 people use the planner.



If the Excel file is stored in the Cloud (Teams or SharePoint) and you work with Office 365, then several employees can open the planner file at the same time and work with it. The “Leave planner” menu ribbon is only available in the desktop app though, and not in the browser.

6.6 Holidays

Since holidays (apart from Christmas and Easter) are regionally different, these can also be entered manually. The holidays row can be shown/hidden via the menu **Administration / Setup and prepare**. For a holiday simply enter an **F** in row 5 on the corresponding day, and the entire column is then colored orange. If the holiday should only be colored in the header area and not in the employee row, then enter an **X** instead of the **F**.

	F							F	F	F		X								
Week 7	May	May	May	May	May	May	May	May	May	May	May	May	May	May	May	May				
Week 8	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu				
Day	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31

In this example, the 13 May (Ascension Day) and the 22 to 24 May (Whitsun) are entered as holidays. Additionally, the 27 May is marked as a special day. As an X was used instead of F, only the header region was colored.

You can also get the wizard to enter national and religious holidays. The wizard calculates the variable holidays like Easter and Whitsun for the current year.

Administration / Setup and prepare / Holiday wizard

6.7 Calendar week

The calendar week row can be shown via the command

Administration / Setup and Prepare / Show/hide calendar week row

6.8 Allow copy/paste from other workbooks.

If you wish to copy data like name, first name etc. from another Excel file when first registering user data, this cannot be done by default. Activate this option to allow copying from another file.

6.9 Column width of the individual days

As Planner administrator, you can change the column width with the mouse as usual in Excel. But if you want to change the column width of all 365 days quickly and conveniently, you can do so via the menu **Administration / Setup and prepare / Change column width of the calendar**.

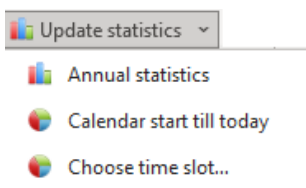
7 Absence Statistics

The user columns are followed by some statistics columns. For the leave type «Vacation», there are other columns, which are the credited vacation days at the start of the year, from the previous year and a balance column. There is only a Total-column for all other leave types.

Depending on the program setting, the statistics are automatically updated at every entry in the calendar or only manually via the command **Update statistics**. The statistics are generally calculated on an annual basis, that is, overall, 365 days. Exception: you have selected in the program settings that statistics will be created from the start of the calendar up to the current day.

The statistics columns can be individually shown or hidden.

Command: **Show/hide columns / Statistics columns**

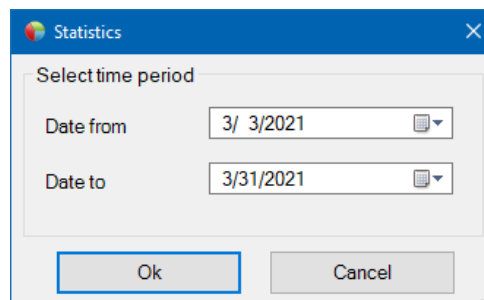


If you wish to create the statistics, e.g., only over one month or any other time period, select the point **Choose time slot...**

Example: to create the statistics for the month of March.

The total values then shown relate to the selected period.

As soon as entries are made in the planner the statistics are again created in a **yearly basis** or **calendar start until today!**



8 Define Personal Settings

The leave planner offers the possibility of individually setting the visible columns and the AutoFilter for each user when the calendar is opened.

8.1 Visible Columns

You can define which columns you wish to see via the menu **Show/hide columns**. The changes are automatically saved. This applies to employee columns and statistics columns.

If you hide certain weekdays, this applies for all users.

8.2 AutoFilter

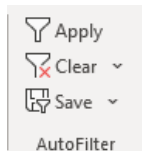
Using the AutoFilter, you can, for example,

- Show only the rows for your team
- Show only your own row
- Show only the row for the team leader
- Many other combinations

	B	C	D	M	J	J	J	J	J	J	J	J	J	J
7	Planning 2022													
8				Apr	Apr	May	May	Ma						
				Mon	Tue	Wed	Thu	F						
10	Team	Lastname	Firstname	29	30	1	2	3						
11	Finance	Adams	Jack											Unpaid
12	Finance	Green	Joseph											
13	Finance	Jackson	Ronnie			Comp.								
14	Finance	Mitchell	Olivia											
15	Finance	Watson	Dylan			Vacation								
16	Finance	Wright	Matthew											

Example of the Filter: only the employees of the *Finance* team are shown.

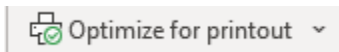
The AutoFilter is part of Excel. If you are not familiar with it, please see the Excel help or details.



By contrast to the visible/hidden columns, the AutoFilter settings are not automatically saved. After you have set an AutoFilter to suit you, select the command **Save** in the **AutoFilter** group. When the calendar is opened, this stored AutoFilter will always be applied. This applies until you define a new AutoFilter. (You can also save AutoFilters if all rows are indicated again).

You can **Clear** the AutoFilter at any time via the menu or **Apply** your saved AutoFilter again.

9 Printing

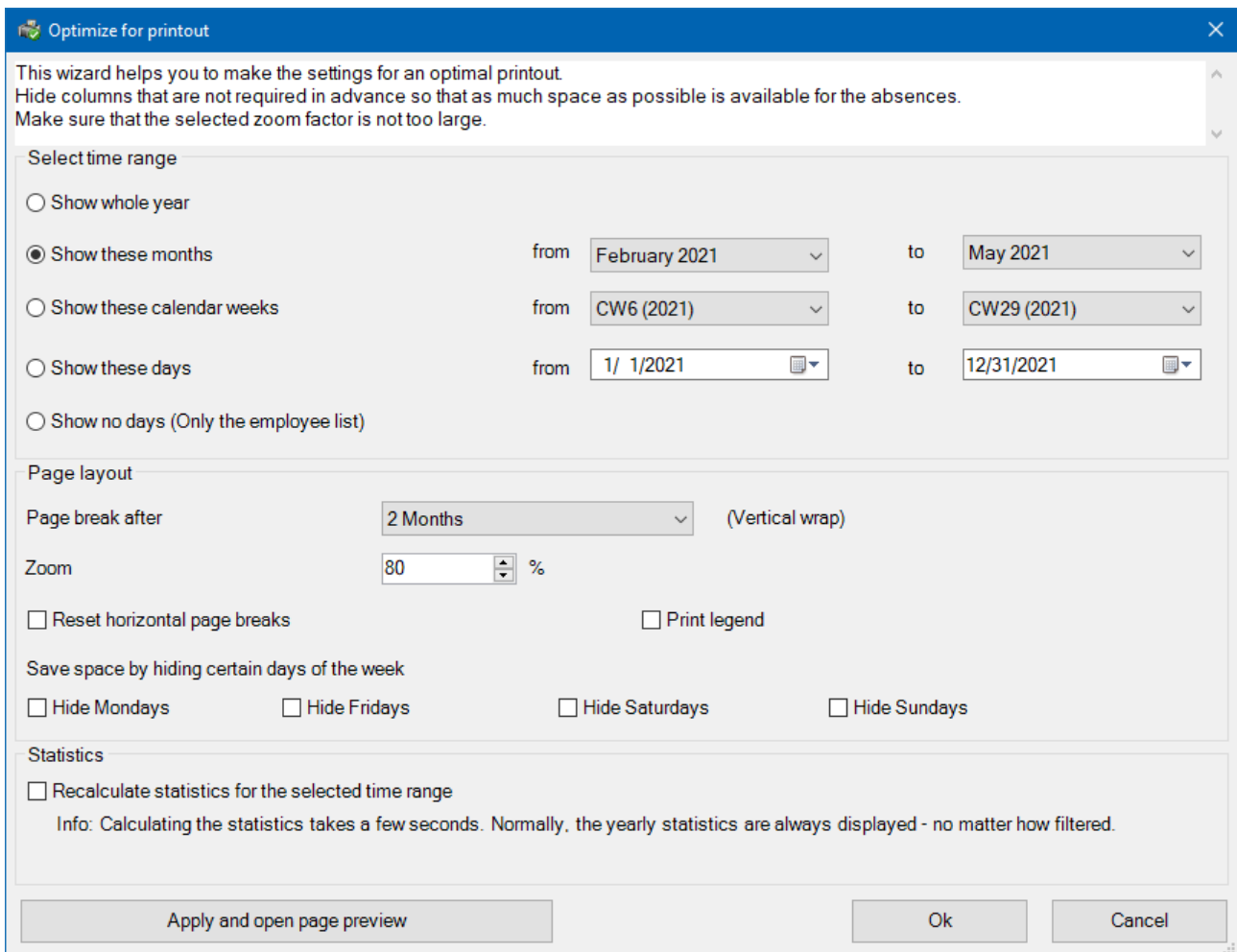


There is a wizard to help you optimize the calendar for printing out.

As a whole year will not fit on one page, the wizard hides all columns except the desired time period. It also shifts the vertical page breaks exactly to the end of the month.

Caution: you cannot fit e.g., 3 months at a zoom factor of 100% on one letter-size sheet. You must select the right zoom factor yourself; if it is too big, the break will be within a month.

The wizard also sets the headers correctly so that the date is always visible.



Hide any columns that are not needed before printing (employee details like department, grade, login etc.) and statistics columns of no interest.

After the wizard has made the settings, you can print the absences. (Before printing you can still access the page formatting manually and make adjustments).

Hidden columns are not automatically shown again after printing. Simply call up the wizard again and select **Show whole year**.

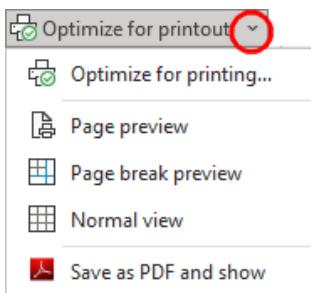
When the leave planner is opened, all columns are automatically shown again.

As well as a monthly basis, you can also specify the time period on the basis of calendar weeks or of individual days directly.

To gain even more space, you can also hide individual days (e.g., all Sundays). In this case, it is recommended that you first carry out the command **Border line after all Sundays** from the **General** menu so that the week borders can be more easily seen.

The vertical page breaks are managed by the wizard (e.g., month borders). The horizontal breaks (necessary if not all employees fit on one page) are generally reset by the program, so that as many employees as possible per page are printed. Uncheck the appropriate checkbox if you wish to define the horizontal breaks yourself (so that you can, e.g., start a new page after each team).

If you have shown the statistics column for the printout, you can choose whether the annual statistics are displayed (default) or the statistics for the selected time period should be re-calculated.

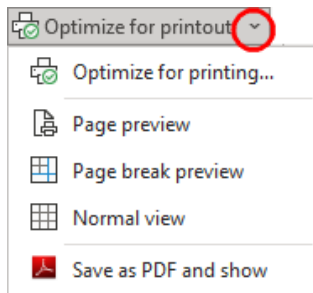


Note:

if you wish to adjust the print area manually, change between the *normal view* and the *Page break preview* via the command illustrated on the left and *not* via the standard Excel menu.

The reason: Otherwise, you cannot change the print area (blue lines) with the mouse.

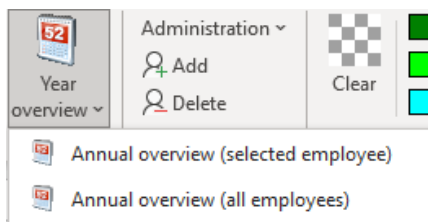
9.1 Create PDF



You can also quite easily create a PDF. You should first though set the desired time period as described in the previous chapter under *Optimize for printout* and check that the zoom factor is correctly chosen, so that a whole month will definitely fit on one page.

Click on the small arrow to the right of **Optimize for printout** and then select **Save as PDF**

10 Create annual overview



An annual overview shown concisely on one letter-sized page is often wanted. The leave planner can create such an overview for one or for several employees at the push of a button.

To create an overview for only one employee (the highlighted employee), click the upper half of the button. To create a summary of all employees, click the corresponding bottom half of the button.

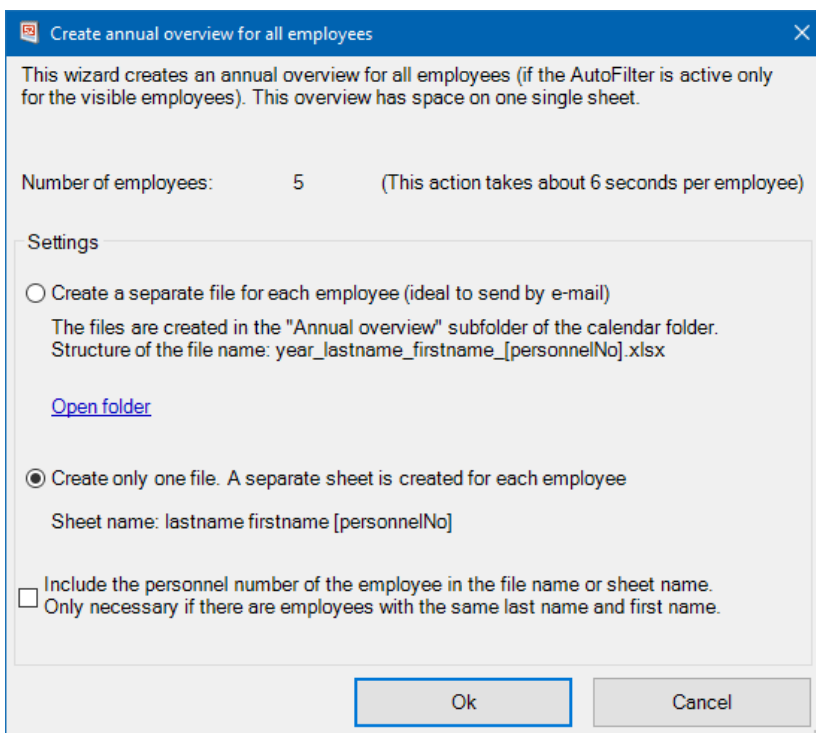
If the AutoFilter is active, an overview is only generated for the currently visible employees.

The annual overview created is completely separated from the actual calendar file. Changes you make in the annual overview do not affect the calendar itself.

10.1 Create annual overviews for all employees

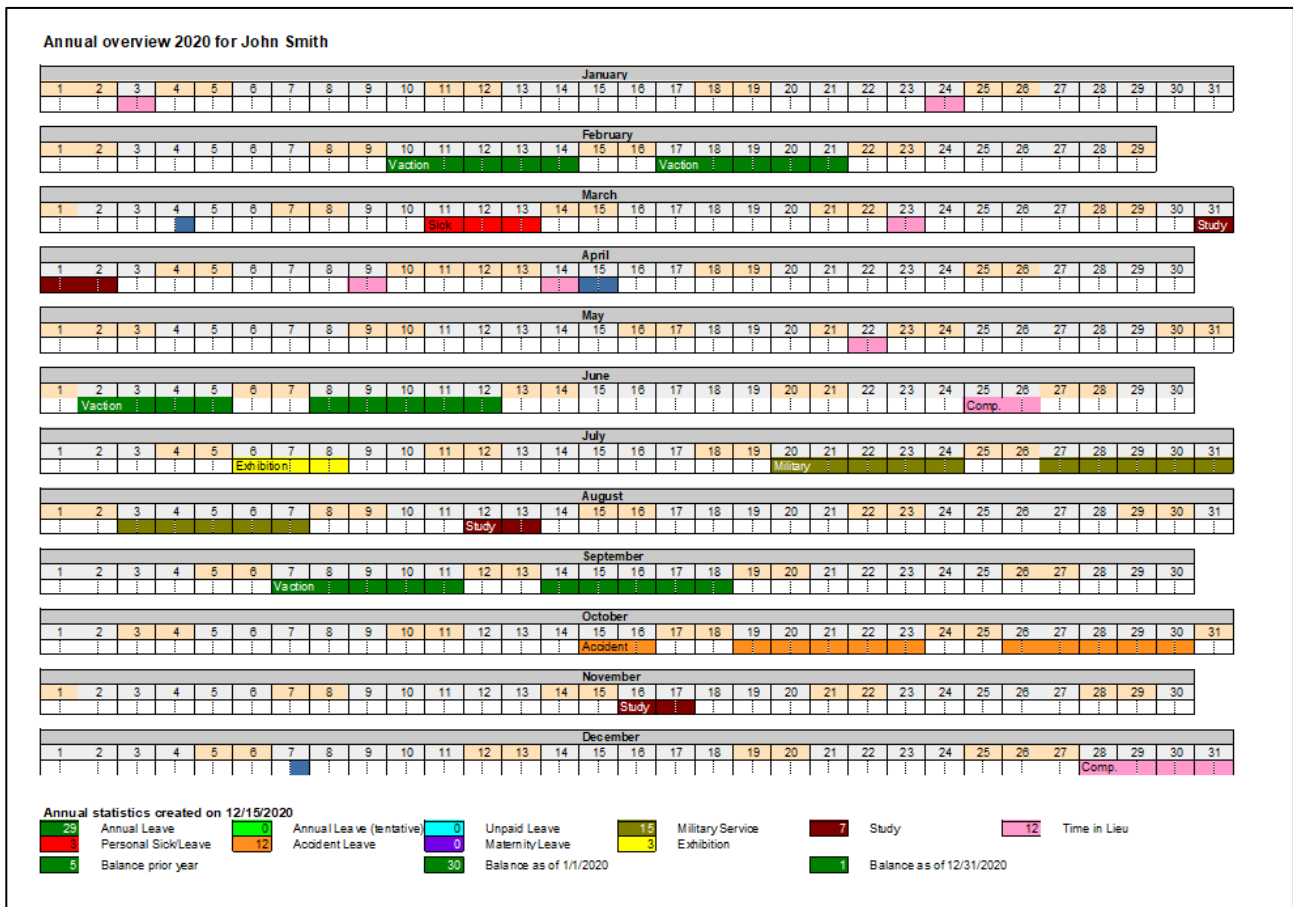
Only calendar administrators may generate an annual overview for all employees. You can manage how the reports are created with a wizard.

If you do not wish to generate a report for all the employees registered in the calendar, then set the AutoFilter appropriately. (E.g., only for a team).



You can also choose whether a separate Excel file is created for each employee or whether all reports are placed in one file. To send each employee the overview later, we recommend the first option but if you wish to print out all reports, you should choose the second option.

In both cases there could be complications if two employees have the same first and last names. The file and the spreadsheet must have a unique name. In such cases, activate the checkbox as well so that the employee number is also included in the name.



View of an annual overview

Note: In general, only the statistics (total days) are listed at the bottom. If you also wish to see the leave days balance at the start and end of the year, you need to activate this in the program settings (**Administration / Settings / Miscellaneous**).

11 Other tools

11.1 Fix header rows

The command for fixing the header row on/off can be found in the **General** menu. The default Excel command is blocked as the worksheet is protected, so you can turn the fix on or off here.

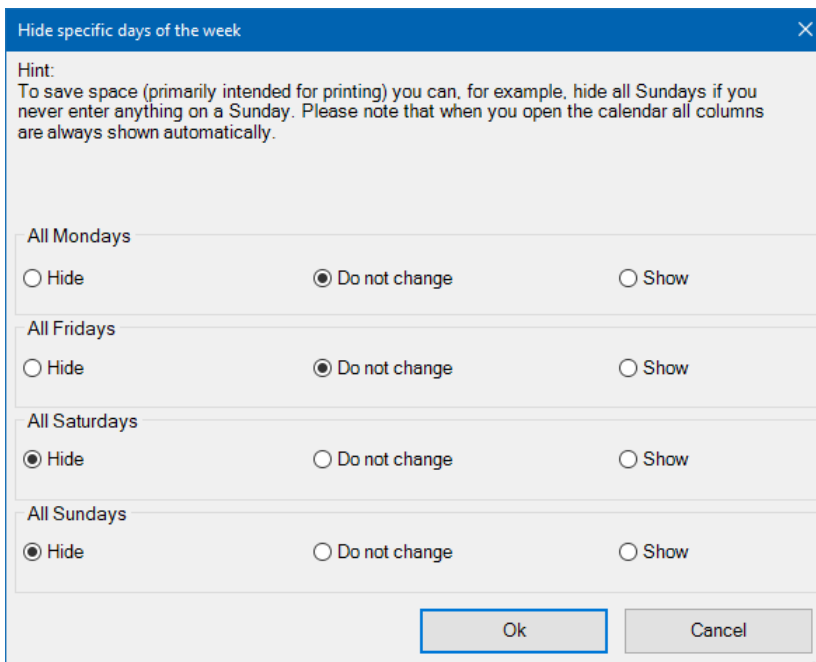
11.2 Re-draw grid lines

When rows are deleted, it can happen in rare cases that part of the grid line is also deleted. If this happens, call up the menu point **General / Redraw all grid lines**.

Under **General** you can also draw a thick line after every Sunday or every Monday and so visibly separate the week.

Tip: You can remove a thick week demarcation line again by calling up the command **Redraw all grid lines** again.

11.3 Hide weekdays



If you e.g., never wish to enter anything on a Saturday or Sunday and want to save more space, you can hide these days as appropriate via the command **Show/hide columns / weekends**. Along with Sat and Sun, Mon and Fri can also be hidden.

Tip: Then call up the command **General / Border line after all Sundays**.

Planning 2022			Balance	Total	Feb 1	Feb 2	Feb 3	Feb 4	Feb 5	Feb 6	Feb 7	Feb 8	Feb 9	Feb 10	Feb 11	Feb 12	Feb 13	Feb 14	Feb 15	Feb 16	Feb 17	Feb 18	Feb 19	Feb 20	Feb 21	Feb 22	Feb 23	Feb 24	Feb 25
Team	Lastname	Firstname	VL	VL	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
Marketing	Carter	Amy	16	4												Vacation				Accident									
Marketing	Clarke	Ralph	5	20					Sick																				
Marketing	Edwards	Thomas	20	5																			Vacation						
Marketing	Hughes	Katie	15	10					Study																				
Marketing	Morgan	George	0	0																									

Default view with Saturday and Sunday shown

Planning 2022			Balance	Total	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	Feb	
Team	Lastname	Firstname	VL	VL	1	4	5	6	7	8	11	12	13	14	15	18	19	20	21	22	25
Marketing	Carter	Amy	16	4							Vacation				Accident						
Marketing	Clarke	Ralph	5	20		Sick															
Marketing	Edwards	Thomas	20	5												Vacation					
Marketing	Hughes	Katie	15	10		Study															
Marketing	Morgan	George	0	0																	

View with hidden weekends, the thick lines are still activated for the week delineation.

11.4 Realign all comments

If you work a lot with comments and the AutoFilter, you will soon notice that the comments are suddenly at a different place to where they were originally positioned. This is a feature of Excel which happens when a row is shown or hidden between the comment and the cell to which it is assigned, as is the case, e.g., with the Autofilter function.

You can correct this flaw of Excel and re-align all the comments at the same distance from the associated cell via the menu **General / Realign all comments**.

11.5 Enter recurring leaves

If you have a weekly absence for an employee and you need to enter this for the whole year, it can be tedious. This can be done with a few clicks using the wizard.

Example of this would be:

- An employee does not work on Mondays.
- An apprentice is in college every Thursday.
- An employee always reduces their overtime on Friday afternoons from March to August. (See illustration below).

You can define what happens if an absence is already entered for such a day, whether it is overwritten or skipped.

11.6 Create Mail Merge with Word

If you wish to use the data in the leave planner for a Word mail merge letter, you must prepare the calendar for this using the assistance function **Administration / Setup and prepare / Prepare for mail merge**. Step by step instructions with further information can be found in the support area of the homepage.

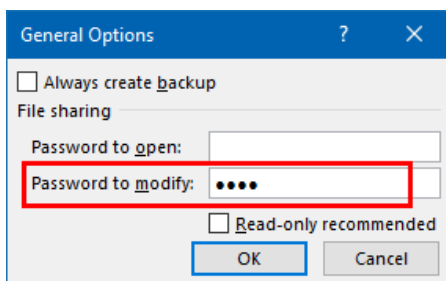
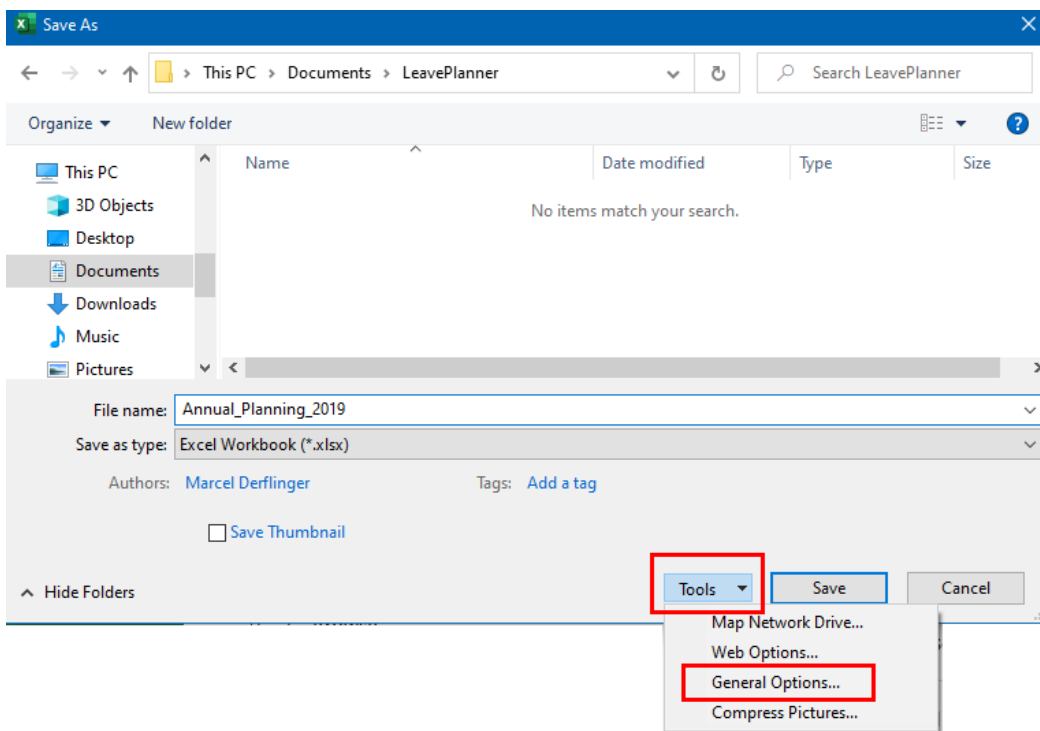
<https://www.excel-leave-planner.com/support/>

11.7 Protect Workbook – only change with password

If only a small number of employees are permitted to make changes to the planner, but everyone else is allowed to see the data, there are two possible solutions.

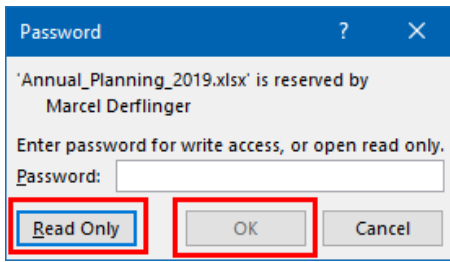
- a) You save the excel file in an area where most users do not have write access.
- b) You set a password for *Write access*.

To implement version b), a calendar administrator must re-save the worksheet once using **File / Save as**. In the save dialog box, *password to modify* can be specified under **Tools / General Options....**



Enter only **Password to modify**.

The password must be repeated a second time for security.



After a password has been assigned and the worksheet has been closed, the dialog shown above will open every time it is opened from now on. Calendar administrators enter the password and click **OK**, other employees open it as **read only**.

12 Adjust Planner for a New Year

A wizard helps you prepare the planner for a new year. Before starting the wizard, first save the calendar so that all modifications from the previous year are safely kept.

Important: Do not start the wizard until you have a new license number that also covers the coming year! (Order for a new year at www.excel-leave-planner.com)

Start the wizard under *Administration / Setup and prepare / Prepare for new year*.

The wizard makes the adjustments and asks you to save the file under a new name when it has finished.

Process after the wizard starts:

- Define new year.
- All absences recorded are deleted, but not the employees.
- The holidays wizard is started.
- You are requested to save the file with a new name.

13 Import Data

To make the transition from Version 6.x easier, the data can be imported. The import function is also practical if the template file is to be changed. Change e.g., from Template A12 to B24.

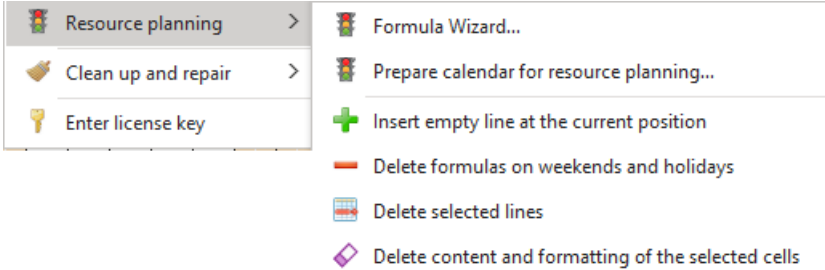
Command: *Administration / Import data*

Process for import:

- You are requested to select the file with the import data.
- A check is made whether the year of the two files agrees. If this is not the case, then only the employees and absences entered can be transferred.
- First the employees, then the holidays, then the leave types and finally the absences are transferred. Current progress can be seen in the status bar (at the bottom of the screen).
- You can also transfer data from Version 7 into different (new) file. Data from a file type *A* (whole days) can be imported to one of type *B* (planning on a half-day basis), but not the other way round. A file with a maximum of 12 leave types can be imported into one with a maximum 24 leave types.

14 Formulas for Resource Planning

Command *Administration / Resource planning*



There is a separate handbook for using resource planning use which can be opened via the **Formula Wizard**. You can find lots of examples of use here.

The leave planner can also be used for resource and deployment planning. The calendar can use the [DV_CountMatch\(\)](#) function for this. Simple formulas can be created with the help of the wizard. Advanced users can also create more advanced formulas themselves.

In general, the number of present or absent employees should be visualized either as a percentage or in absolute terms. A traffic light symbol can also be added via conditional formatting.

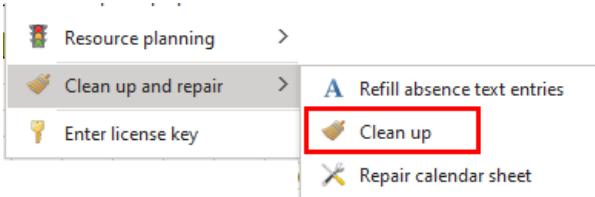
The leave planner does not normally need numbers/texts in the cells to create statistics, just the background color. **However, for the resource planning formulas, something must be entered in each cell where the employee is absent.**

Team	Lastname	Firstname	7	8	9	10	11	12	13	14	15	16	17	18	19
New York	Green	Joseph	V	V			V	V	V	V	V			F	F
New York	Nyffenegger	Marcel													
New York	Pfister	Anton					F	F	F	F	F				
New York	Pfister	Kurt											M		
Boston	Hughes	Katie					N	N	N	N	N			N	N
Boston	Johnson	Benjamin													
Boston	Smith	Oliver					o								
Boston	Stoller	Oliver								S	S			S	S
Boston	Wyss	Lars					o								
Boston	Clarke	Ralph					M	M	M	M	M				
Number Present			9	9	10	10	4	6	6	5	5	10	9	7	7
Number Present in percent			90%	90%	100%	100%	40%	60%	60%	50%	50%	100%	90%	70%	70%
Green >= 80%, Yellow >=50%			●	●	●	●	●	●	●	●	●	●	●	●	●

Different ways of displaying the number of employees present

15 Clean Up and Repair Data

15.1 Clean up



The orange background of Saturdays, Sundays and holidays orange is done via the Excel conditional formatting. This has the consequence that if you wish to enter an absence on an “orange” day, this can only be done by selecting **each cell individually** and then clicking the colored absence icon. The trick is that the software then enters either a text (abbreviation of the leave type) or a space. The conditional formatting formula takes this into account and does not then color the cell orange → the absence is visible.

The following problem is linked to that and has led to errors in the past:

Case a) A vacation is entered afterwards.

Start	Balance	Total	Jul	Jul	Jul	Jul	Jul	Jul	Jul	Aug	Aug	Aug	Aug
			Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
VL	VL	VL	26	27	28	29	30	31	1	2	3	4	
25	20	5				Vacation							

A week’s vacation is entered from 29 July to 2nd August. That is 5 days, which is also correctly shown in the statistics.

Now it is noticed only later it was forgotten that 1st August is a holiday and so “F” was entered in the holiday row. (Or by holiday wizard).

Start	Balance	Total	Jul	Jul	Jul	Jul	Jul	Jul	Aug	Aug	Aug	Aug
			Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
VL	VL	VL	26	27	28	29	30	31	1	2	3	4
25	20	5				Vacation						

As a result of this, 1st August no longer shows as green, which it of course still is, and is still shown in the statistics as well. The conditional formatting covers the green absence over though.

This triggers a search for why the “sums” don’t add up. The solution would be to delete the vacation absence on 1st August as the employee does not need to take a day’s leave.

The function **Administration / Clean up and repair / Clean up** solves this problem by investigating all cells where an absence has been entered but this is not visible due to the orange coloring and deleting the “invisible” absence.

Case b) An absence cell contains only a space even though it is a “normal” day

This could be a leftover from, e.g., the Saturdays having previously been colored, but no longer are. The software entered a space previously to color the cell green and not orange so that an absence could be entered. This space is no longer needed if the Saturday is no longer colored orange. Let’s take a shop that opens on Saturdays as an example of this.

May	May	May	May	May	May	May	May	May	May	May	May
Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
9	10	11	12	13	14	15	16	17	18	19	20
	Vac										

Starting basis: The Saturdays were colored; an employee takes a vacation from Friday to Saturday.

The planner is set up to that Saturdays are never colored.


This does not have an adverse effect as in case a). The statistics are correct, everything is shown correctly. The only aesthetic issue is that the word “Vacation” is cut off, as there is a space in the cell after it.


May	May	May	May	May	May	May	May	May	May	May	May	May
Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	
9	10	11	12	13	14	15	16	17	18	19	20	
	Vac											


The **Clean up** function has deleted this no longer needed space on Saturday and the text "Vacation" is no longer truncated.

May	May	May	May	May	May	May	May	May	May	May	May	May
Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	
9	10	11	12	13	14	15	16	17	18	19	20	
	Vacation											

15.2 Repair Calendar

 Refill absence text entries



 Clean up

 Repair calendar sheet

- Re-sets the print area to default
- Deletes defective cell names

Administration / Clean up and repair

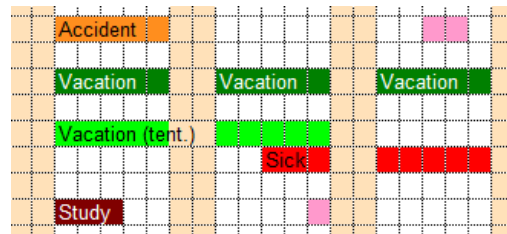
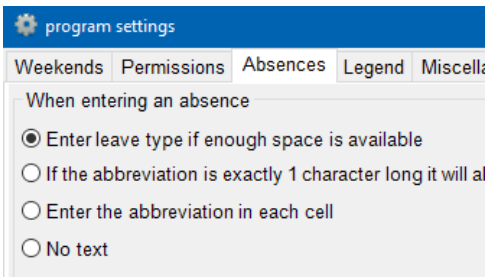
15.3 Refill Absence Text Entries

- A Refill absence text entries
-  Clean up
-  Repair calendar sheet

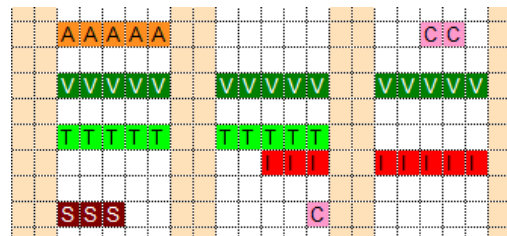
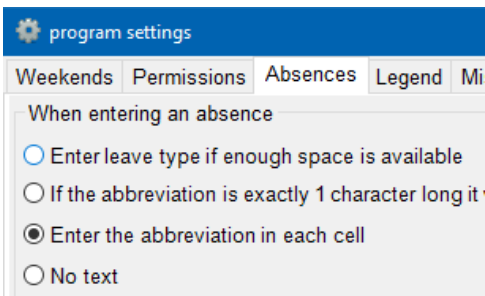
This function helps you in connection with the resource planning formulas. If you wish to use these formulas, it is not sufficient for a cell for an absence to be colored, there must be a text (leave type abbreviation) in **every** cell. You can define in the settings what text is written in the cell when an absence is entered. If this setting is later changed, newly entered absences are treated differently with immediate effect, but all already existing absences are not changed in their appearance. You can also subsequently adjust the appearance of already entered absences via this function.

Procedure:

First select the desired appearance of the calendar under **Administration / Settings / Absences**.



Then select the command **Administration / Clean up and repair / Refill absence text entries**. All absences are then re-entered according to the selected setting.



16 Troubleshooting

- Ensure that there are no square parentheses [] in file names. Excel has a problem with that, and the leave planner will not function correctly. "Absence planner[1].xlsx" for example, would not be permitted.

16.1 Problem: Add-in does not load

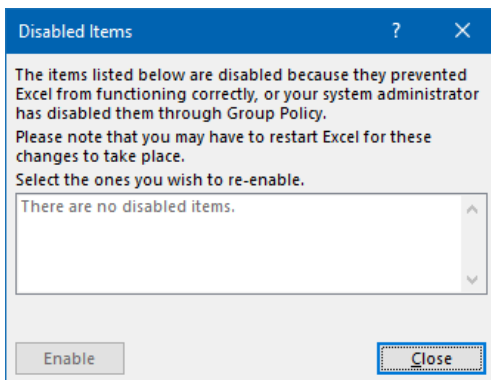
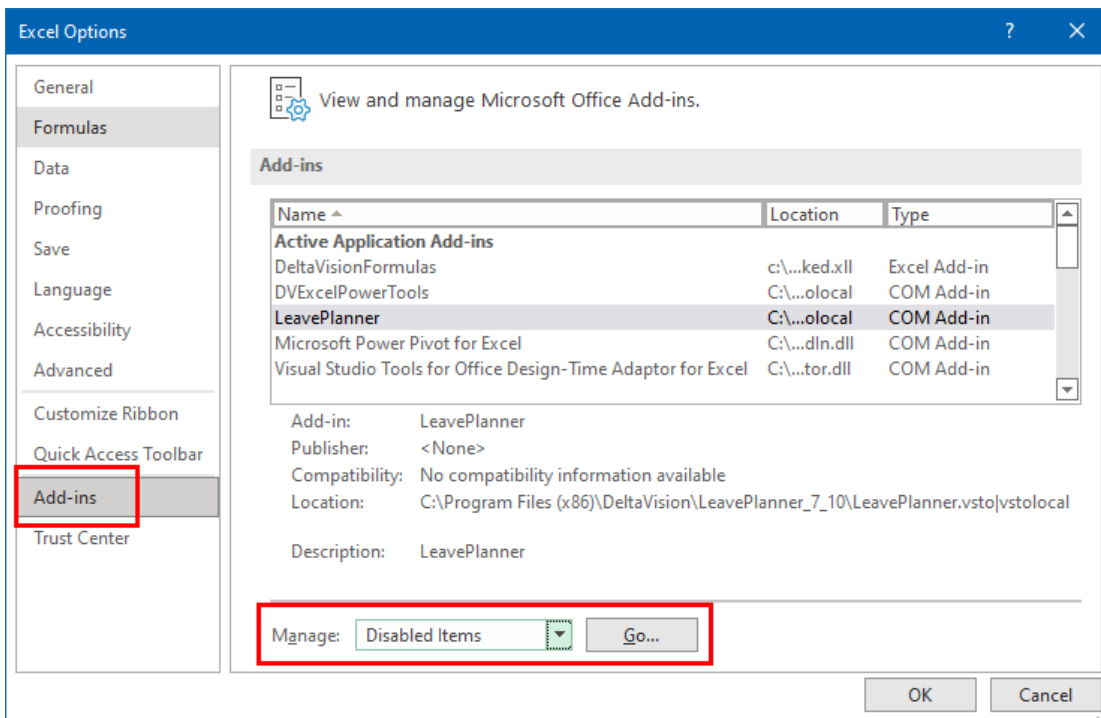
Symptom: The *Leave Planner* menu ribbon does not appear even if a Version 7.x calendar file is opened. There is also no option for creating a new calendar file under **File / Add-Ins / Leave Planner**.

If the Add-in causes an error, it is possibly blocked by Excel for the next start. If the Add-in does not load for you, check the disabled elements first. Then you can check the start behavior under the COM Add-ins.

16.1.1 Disabled Items

You can show the list of disabled elements as follows:

Click in Excel on **File / Options** and then select **Add-ins** on the left. Select **Disabled Items** on the right and click **Go...**

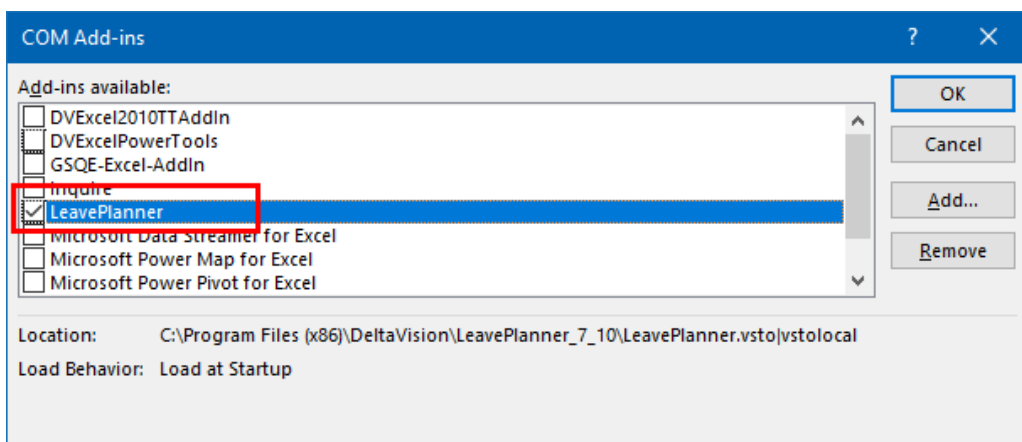
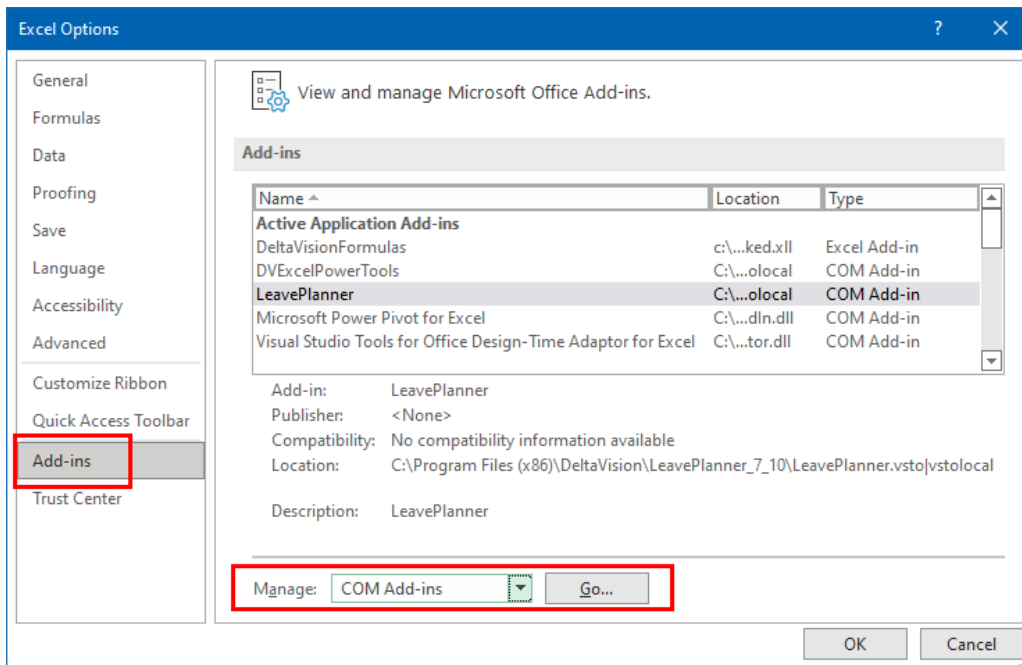


If the Add-in *LeavePlanner* is listed in this dialog, then select it and click **Enable**.

All dialogs then close and Excel re-starts.

16.1.2 COM-Add-Ins

If the Add-in still does not load the next time Excel starts, check whether the box next to **LeavePlanner** in the **COM-Add-ins** under **File / Options / Add-ins** is checked.



The **LeavePlanner** Add-in must be **enabled**.

If there is a fault with the .Net VSTO-Framework, it may be that the LeavePlanner is automatically disabled again by Excel. If the checkbox was not checked, then check it, close the dialog box and re-open it and check whether the LeavePlanner is still enabled. If it is not, then the error lies in the basic requirements for the yearly planner.

If you cannot rectify the problem, then contact our Support or continue to the next chapter where logging is explained.

16.2 Activate Logging – Info only for IT-Administrators

If the Add-in is installed, but then always disables itself, the **VSTO-Framework** logging can be activated for further information. Two environmental variables must be set for this. It is sufficient to set the environmental variables in the user context.

Enables creation of a logfile for errors. To disable, set the variable to 0 or delete it.

`VSTO_LOGALERTS = 1`

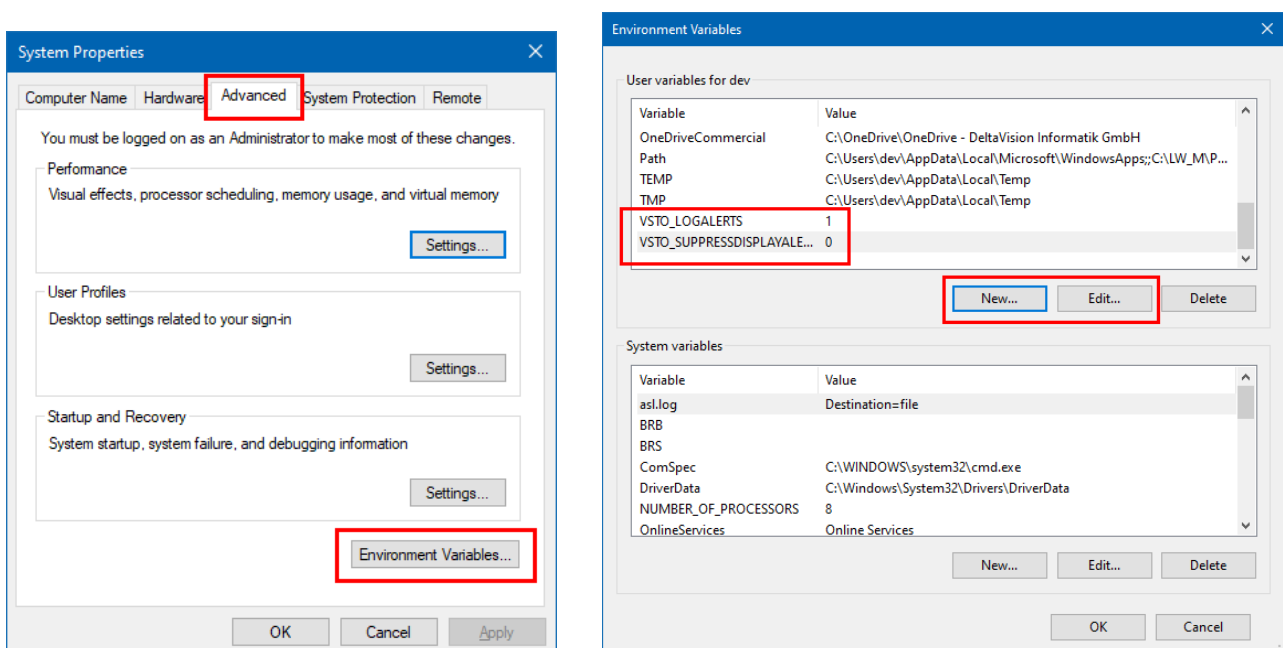
Enables output of error notifications in a MsgBox. To disable, set the variable to 1 or delete it. the logfile is created as `%temp%\LeavePlanner.vsto.log`.

`VSTO_SUPPRESSDISPLAYALERTS = 0`

The variables can be set manually or e.g., via a PowerShell script.

16.2.1 Entering Environmental Variables manually

- Press **Windows-button + R**
- Type in `Sysdm.cpl` and press **Enter**
- Switch to the **Advanced** tab in the **System Properties** dialog
- Click the **Environmental Variables** button.
- In this dialog, you can now register the two environmental variables under **New** and also delete them again later.



16.2.2 Entering environmental variables with PowerShell command

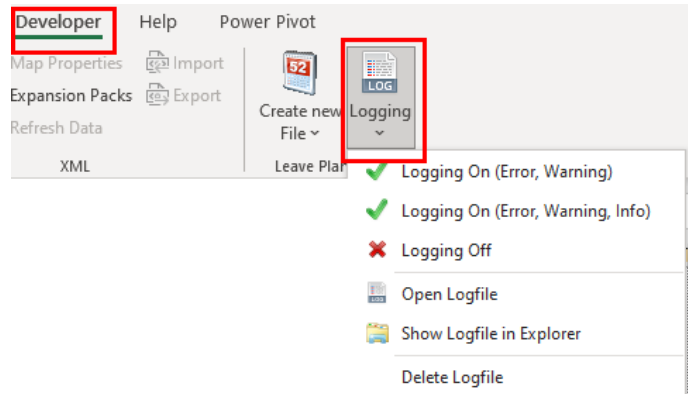
```
## Normally [0] or the variable does not exist: No logging
[System.Environment]::SetEnvironmentVariable('VSTO_LOGALERTS', '1', [System.EnvironmentVariableTarget]::User)

## Normally [1] or the variable is not present: No output via MessageBox in case of an error
[System.Environment]::SetEnvironmentVariable('VSTO_SUPPRESSDISPLAYALERTS', '0', [System.EnvironmentVariableTarget]::User)
```

The PowerShell script can be downloaded from the LeavePlanner support page.

16.3 Activate the LeavePlanner Logging (only for IT-Administrators)

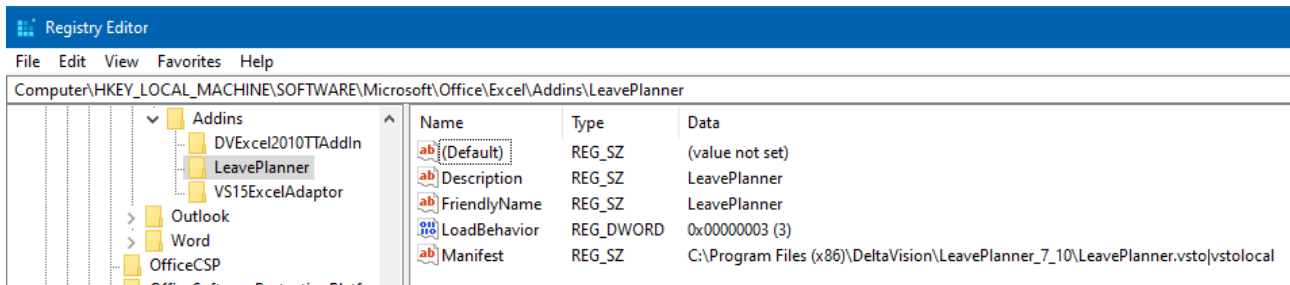
If the Add-in is loaded (that is, the LeavePlanner remains activated in Excel in the COM-Add-ins), errors that arise in the Add-in can also be recorded in a logfile. The default setting is for Logging to be disabled, but it is easy to enable again via the **Developer-Tools** tab.



16.4 Temporarily Disable Add-in, Start Behavior of the Add-in Only for IT-Administrators

The Add-in of the LeavePlanner is loaded via a registry input. This Start entry is found under HKLM or HKCU, depending on whether you used the **Admin** Setup or **User** Setup for installation. If errors arise, it could also be that Excel itself disables the Add-in in HKCU. Both places should thus be checked. HKCU overrides the setting in HKLM. Normally, there is no entry in HKCU.

The keys themselves are the same under HKLM as HKCU.



The **LoadBehavior** is decisive:

If it is **3**, then the Add-in is automatically loaded when Excel is started.

For **2** the Add-in is disabled but can be loaded by the user via the COM Add-ins dialog.

For **0** the Add-in is disabled and cannot be loaded.

Registry hive for **HKCU**:

[HKEY_CURRENT_USER\Software\Microsoft\Office\Excel\ s\LeavePlanner\](#)

Registry hive for **HKLM** depends on whether Office is installed in the 32- or 64-Bit version.

Version a) Windows 64 Bit, Office 32 Bit:

[HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Microsoft\Office\Excel\Addins\LeavePlanner\](#)

Version b) Windows 32 Bit and Office 32 Bit or Windows 64 Bit and Office 64 Bit

[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Office\Excel\Addins\LeavePlanner\](#)

17 System Requirements

The following are the system requirements for the LeavePlanner to work on your PC:

- Windows-PC with Windows 7, 8, 8.10 or 11 (32 or 64 Bit)
- Office 2013, 2016, 2019 or Office 365 (32 or 64 Bit)
- .Net Framework Version 4.6.2 or higher
<https://www.microsoft.com/de-de/download/details.aspx?id=53344>

18 Contact

We would be pleased to receive feedback or hear new ideas.

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