# CSR Scheduling Program Tutorial

The CSR Scheduling program is a way to look for “gaps” within the CSR Schedules. For this program to work you must follow a few guidelines. Below is a tutorial in the program, broken up into a few quick how to guides.

## Overview

The reporting function in the program is simple enough. All you must do is link an excel spreadsheet, configure some basic settings, then click the generate report button.

## Linking a Spreadsheet

Graphical user interface, application, Word

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Figure

A screenshot of a computer

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Figure

Before you can generate a report, you must link a spreadsheet. Linking a spreadsheet tells the program where the excel spreadsheet file you want to use is located. To link a spreadsheet, click the “Link File” menu item (Figure 1). Once you have clicked this, a file dialog will appear (Figure 2). Simply navigate to the folder on your computer where the spreadsheet is and select it. If you do not see the file in the expected folder, check the Troubleshooting section to fix this. Once you have selected the file, the bottom of the main screen should now say something like “File: C:\Users\...\*spreadsheet\_name*.xlsx selected.”

## Configuring

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Graphical user interface, application

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Figure

The second (not necessarily mandatory) step is configuring the options of the program. In order to do this, click on the “Configure” menu option (Figure 3). There are two options under this menu item: “Schedule” and “Validation”. The “Schedule” section (Figure 4) will allow you to set how many employees will be working on the schedule. Alternatively, you can choose a specific date range to assign a value to. Every date in the schedule initially has a value of 8 assigned to it. Therefore, when the program is reading the excel spreadsheet, it will be looking for 8 employees initially. If any of the tables in the spreadsheet differ from this, it is important you change the configuration. The “Validation” tab (Figure 5) lets you configure how you want the program to check for gaps. You can change both the minimum number of people as well as the required positions. Just like in the “Schedule” section, these can be applied to all dates or specific dates. The default minimum number of people is 4 and the default required positions are Drive Thru.

## Report

The final step is to press the button that says, “Generate Report”. Once you click on this button the program will begin reading and analyzing the schedules. After a few seconds it will spit out a report to the screen that will give details on which days have gaps. If no days have gaps, it will say “There were no gaps found.”

## Formatting

Before you jump into using the program, you must make sure the Excel spreadsheets are formatted correctly:

Graphical user interface, table

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Figure

There are a few very important things to note about the way the above sheet is formatted. First: the beginning date of the week is in the cells L1 and M1. This is extremely important. Without a date in these cells in particular, the program will give an error stating that the date L1 and M1 is not valid” (see Errors section). Other things to note that will also give similar errors: the third row is blank, the first table starts in cells B4:B5, and the time is in row 5. Finally, make sure that there is always exactly 1 week per sheet, exactly 1 row between tables, the date of the table is always in the top left two cells of the corresponding table, that the time is in the second row of the table, and that the tables start in B and end in L (at least the times should end in L). If you follow this template for making up the schedule sheets, they will work just fine.

## Troubleshooting

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Figure

If you can’t find your excel spreadsheet in the folder you expect it should be, go to the bottom right of the file dialog and try to use a different file filter (Figure 7). If it isn’t saved as a .xlsx, it may be saved as a .xls. If that doesn’t work, try using the “All Files” filter. That will show every file type in the folder.

## Errors

Graphical user interface, text, application, email

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Figure

Errors like those found in Figure 8 are generated by an ill formatted excel spreadsheet or individual table. The program will still run the report on any nonaffected sheets. Another reason an error like the one above occurs is due to a wrong configuration.

Graphical user interface, text, application

Description automatically generated

Figure

This error occurs when you try to run the report without linking a file first.

Graphical user interface, text, application, email

Description automatically generated

Figure

This error is caused by a corrupted file. This file just lets you save the configuration options when you close the program. More than likely, it has been accidentally deleted. When this happens, just click the “Repair” button and a new configuration file will be created. When this happens, you will lose your configuration options from before. Just make sure to reenter those options before generating the next report.

Graphical user interface, text

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Figure

If you see this just hit quit and contact me at [ahamilton@e-u.cc](mailto:ahamilton@e-u.cc). It means there is a hidden bug in the program that needs to be fixed. Try to remember what happened before this error occurred so that I may fix the bug and rerelease the program.