**Scheduling Workbook Documentation**

**All Therapists Sheet**

Changes:

* Added more columns – can now assign 18 rooms per therapist
* Widened column W just enough so that contents of cells do not extend beyond the conditional formatting

Named Ranges Added:

* *AllTherapistsInitials*: column containing therapist’s initials

**3W Schedule**

Changes:

* “Gray Options” box was expanded and standardized with boxes on other schedules to allow for more options in the future

Named Ranges Added:

* *Eval\_Int\_3W*: column for specifying EVAL or INT
* *GrayOptions3W*: list of gray options at bottom of schedule
* *Rooms3WSchedule*: column listing rooms
* *SchedGrid3W*: cells that hold therapists’ initials for each time slot

**8P Schedule**

Changes:

* “Gray Options” box was expanded and standardized with boxes on other schedules to allow for more options in the future

Named Ranges Added:

* *Eval\_Int\_8P*: column for specifying EVAL or INT
* *GrayOptions8P*: list of gray options at bottom of schedule
* *Rooms8PSchedule*: column listing rooms
* *SchedGrid8P*: cells that hold therapists’ initials for each time slot

**3P Schedule**

Changes:

* “Gray Options” box was expanded and standardized with boxes on other schedules to allow for more options in the future

Named Ranges Added:

* *Eval\_Int\_3P*: column for specifying EVAL or INT
* *GrayOptions3P*: list of gray options at bottom of schedule
* *Rooms3PSchedule*: column listing rooms
* *SchedGrid3P*: cells that hold therapists’ initials for each time slot

**All Schedules Sheet**

Changes:

* Added more rows – can now assign 18 rooms per therapist
* Removed all formulas except “Date”
* 30 sheets have been formatted – can accommodate the creation schedules for 30 therapists
* Page breaks have been added to ensure each sheet prints on a separate page
* Schedules are created by clicking the “Create Schedules” button to the right of the printable area
* Added a box that displays the last date and time that the schedules were created
* Changed font size of each time slot cell so it’s a little more readable

Named Ranges Added:

* *AllSchedDataGrid*: time slots on each schedule under therapist’s initials
* *AllSchedNoteCells*: single cell at bottom of each schedule for notes
* *AllSchedTherapistInitialsBox*: cells containing therapist’s initials at the top of each schedule
* *EvalKeyBox*: cells that show the highlighting scheme for EVAL
* *IntKeyBox*: cells that show the highlighting scheme for INT
* *RoomsAllSchedules*: cells that contain the room numbers for each therapist
* *AllSchedulesTimeCreatedCell*: holds date and time of last time all schedules was created
* *Print\_Area*: automatically generated print area for 30 schedules (DO NOT EDIT)

How it works:

* Clears old data and highlighting
* Loops through 3W and 8P schedules to get therapists’ initials, rooms and time slots
* Programmatically applies conditional highlighting
* The “Create Schedules” button turns off the alert requesting permission to replace previous data; the alert is turned on again after the script runs

Dependencies/Limitations:

* Does not contain information for 3P
* Depends on 3W and 8P column and row structure and named ranges
* “Date” comes from 3W schedule via formula (“Schedule Last Created” is created programmatically)
* For accuracy, the All Schedules sheets should not be created until the All Therapists sheets and the 3W and 8P schedules are complete
* Changes to All Therapists, 3W Schedule, and 8P Schedule do not update All Schedules sheet; “Create Schedules” button must be clicked again to create schedules that reflect those changes
* All Schedules can only accommodate 3 therapists, with a limit of 18 rooms per therapist; creating more therapists and/or more rooms will require changes to the code

**All Diddies Sheet**

Changes:

* Reformatted with page breaks so each diddie prints four diddies to a page in landscape orientation
* Removed all formulas except “Date” which pulls the date from the 3W schedule
* Diddies are created by clicking the “Create Diddies” button
* Added a box that displays the last date and time that the diddies were created
* Top row of diddies is used for 3W schedule
* Bottom row of diddies is used for 8P schedule

Named Ranges Added:

* *Print\_Area*: automatically generated print area (DO NOT EDIT)
* *SchedCol3WAllDiddies*: cells containing therapists’ names in top row of diddies
* *RoomsRow3WAllDiddies*: cells containing room numbers in top row diddies
* *SchedCol8PAllDiddies*: cells containing therapists’ names in bottom row of diddies
* *RoomsRow8PAllDiddies*: cells containing room numbers in bottom row diddies
* *AllDiddiesTimeCreatedCell*: holds date and time of last time all schedules was created

How it works:

* Clears previous data and any highlighting
* Grabs rooms from the 3W and 8P schedules by looking at the Y and Z columns; if both the Y and Z columns are empty (no OT or PT listed), a diddie for that room is not created; If only one column is empty (has an OT but no PT, for instance) the diddie will be created for that room
* When the “Create Diddies” button is clicked, the sheet grabs the initials, names and professions of each therapists listed 3W and 8P schedules and puts them into the diddies
* Uses HelperMethods mod to find initials and gray options
* Alerts are turned off when button is clicked and turned back on when code has finished running

Dependencies/Limitations:

* Does not contain information for 3P; however, it is reading the gray options for 3P in preparation for adding the 3P schedule
* Depends on Column and row structure/named ranges for “Gray Options” boxes on all three schedules
* Y and Z columns on 3W and 8P schedules; if cells in both columns are empty for a given room, a diddie will not be created
* Depends on 3W and 8P column and row structure/named ranges
* “Date” comes from 3W schedule via formula (“Schedule Last Created” does not depend on this formula)
* For accuracy, the All Diddies sheets should not be created until the All Therapists sheets, 3W and 8P schedules are complete, and the gray options have been updated if necessary
* *Changes to All Therapists, 3W Schedule, 8P Schedule and gray options do not update All Diddies sheet; “Create Diddies” button must be clicked again to create diddies that reflect those changes*

**Ind Schedule Sheet**

Changes:

* Copied a schedule from All Schedules and pasted format into sheet
* Removed all formulas except “Date” which pulls the date from the 3W schedule
* Added the “Create Schedule” button

Named Ranges Added:

* *IndSchedData*: time slots on schedule under therapist’s initials
* *IndSchedNoteArea*: Entire area for adding notes under NOTE heading
* *IndSchedNoteRef*: cell where notes from All Therapists are pasted
* *IndSchedInitials*: cell containing therapist’s initials at the top of schedule
* *IndSchedEvaltCell*: cell that shows the highlighting scheme for EVAL
* *IndSchedIntCell*: cell that shows the highlighting scheme for INT
* *IndSchedRooms*: cells that contain the room numbers for each therapist
* *IndSchedArea: entire schedule and note area*
* *Print\_Area*: automatically generated (DO NOT EDIT)

How it works:

* Clears old data and highlighting
* User changes initials in initials cell and clicks Create Schedule button
* Loops through 3W and 8P schedules to get therapists’ initials, rooms and time slots
* Programmatically applies conditional highlighting
* The “Create Schedule” button turns off the alert requesting permission to replace previous data; the alert is turned on again after the script runs

Dependencies/Limitations:

* Does not contain information for 3P
* Depends on 3W and 8P column and row structure and named ranges
* “Date” comes from 3W schedule via formula (“Schedule Last Created” is created programmatically)
* For accuracy, the All Schedules sheets should not be created until the All Therapists sheets and the 3W and 8P schedules are complete
* Changes to All Therapists, 3W Schedule, and 8P Schedule do not automatically update Ind Schedule sheet; “Create Schedule” button must be clicked again to create a schedule that reflects those changes
* Depends on button click to function

**Code Modules**

Functionality was broken down into different modules, subroutines and functions in order to (hopefully) make the code easier to read and change

AllSchedulesMod:

Contains the main subroutines and functions for All Schedules sheet functionality

* *getNotes():* grabs therapist’s notes from the All Therapists sheet and puts them into the therapist’s schedule
* *getRooms():* gets rooms listed next to therapist’s name in All Therapists and puts them in therapist’s schedule
* *readSchedules():* loops through 3W and 8P schedules to get schedule info for each schedule
* *createSchedules():* subroutine that handles click event when the “Create Schedules” button is clicked

AllDiddiesMod:

Contains the main subroutines and functions for All Diddies sheet functionality

* *createDiddies():* event handler for “Create Diddies” button; reads 3W and 8P schedules and adds them to diddies

HelperMethods:

Contains the subroutines and functions that may be used by more than one module; contains subroutines to assist with debugging

* *clearAllSchedules():* clears contents from All Schedules sheet; changes interior of highlighted cells to white (removes conditional highlighting)
* *clearDiddies():* clears contents from All Diddies sheet; changes interior of highlighted cells to white (removes conditional highlighting)
* *getNameAndProf():* Data validation function that returns “LUNCH”, “GRAY”, “TMG Procedure” or therapist’s name and profession for use in diddies
* *lastTimeCreated():* returns current date and time
* *checkValue(value AS String):* takes a string value and determines if it is a therapist’s initials, lunch, or a gray option; returns therapist’s name & profession, LUNCH or GRAY
* *lastTimeCreated():* takes a range as an argument and puts the current date and time into that range; used to keep track of the last time diddies and schedules were created
* *returnInitials():* takes a string value from a cell and extracts and returns the therapist’s initials, “NOTE” if the cell contains a note, or “TMG” since this is similar to the initials format
* *isGray():* returns TRUE if value is a gray option listed in 3W, 8P or 3P; otherwise returns FALSE
* *copyNames():* copies named ranges from one workbook to another
* *clearIndSchedule():* clears Ind Schedule data and highlighting
* *schedCondFormat():* takes cells for eval and int highlighting keys, room ranges to highlight for int and eval, therapist's initials box range to check, and sheet name to highlight; applies conditional highlighting to schedule

IndScheduleMod:

Contains the main subroutines and functions for Ind Schedule sheet functionality

* *createIndSched ():* subroutine that handles click event when the “Create Schedule” button is clicked; clears previous data and highlighting, creates schedule by looping through 3W and 8P schedules, grabs notes from All Therapists and applies conditional highlighting

ModFromOrigWB:

Contains the old subroutines for original workbook; currently unused module

* *SelectRange()*
* *PublishRange()*
* *LaunchHyperLink(*

SaveSchedMod:

Contains the subroutines for password protecting macro and creating PDF versions of the schedule

* *PasswordProtect():* specifies file paths, specifies names of PDFs generated and saves 2 copies of generated PDF schedule
* *SaveSchedule():* save the current schedule as PDF for use with Scheduling PDF script
* *SaveArchive():* save the current schedule as an Archived PDF file
* *SaveToODS()*
* *LaunchSchedulizer():* open the current schedule in a web-browser
* *GetRange():* return the range needed for each of the 2 schedules

SaveSchedPDFMod:

Contains the subroutines for password protecting macro and creating PDF versions of the schedule

* *PasswordProtect():* specifies file paths, specifies names of PDFs generated and saves 2 copies of generated PDF schedule
* *SaveSchedule():* save the current schedule as PDF for use with Scheduling PDF script
* *SaveArchive():* save the current schedule as an Archived PDF file
* *SaveToODS()*
* *LaunchSchedulizer():* open the current schedule in a web-browser
* *GetRange():* return the range needed for each of the 2 schedules
* *GetDate():* return the current date being used

searchRangeMod:

Contains searchRange function

* *searchRange():* searches for a val in sRng, if the value matches the in the same row first column is returned to the cell

**ThisWorkbook Code**

* Workbook\_Open - allows macros to run (and buttons to work) when workbook is protected

**Sheet2 Code**

* CommandButton1\_Click()
* SaveSchedule()
* SaveArchive()
* SaveToODS()
* LaunchSchedulizer()
* GetDate()
* GetRange()

**Sheet3 Code**

* CommandButton1\_Click()
* SaveSchedule()
* SaveArchive()
* SaveToODS()
* LaunchSchedulizer()
* GetDate()
* GetRange()

**Sheet8 Code**

* Worksheet\_Change - Ind Schedule (Sheet8) updates when initials are changed and enter is pressed