# Instruction of the Program

# Goal

Create incentives for the workers to gain priority upon current sequence by choosing certain shifts and redeeming the points gained.

The current schedule sequence is based on a fixed priority list, which is the initial\_order for worker. Pay attention that the sequences are separated for senior and junior workers.

The process of the system consists of two stages.

- 1: In-group and type based sign-up sequence generation
  - For the next week's schedule (the sign-up sequences of the senior and junior workers are separated).
  - Choose workgroup (publish in group initial order by admin) priority score
- 2: The schedule sign up process
  - Demand updated from customer: Right now the system is a weekly signup system but the
    customer would like to have a monthly signup system. Although the system could be
    updated to perform the functions, I recommend to implement the system

#### Roles

- worker
  - · type: senior and junior, comes with different requirements on the workgroup limit
  - two factors decide the sequence in choosing the schedule
    - initial\_order: the current fixed sequence of schedule sign-up
    - · points redeemed
- admin
  - suggested id: 0000, as it is used for the notification for the admin

# Packages used

pip install flask flask-sqlalchemy werkzeug flask-login pandas openpyxl

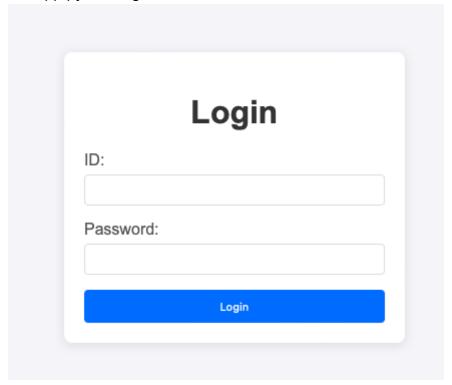
# **Demonstration of the process**

# **Add admin**

 run create\_admin.py suggested id: 0000

# Run the program

• run app.py and login

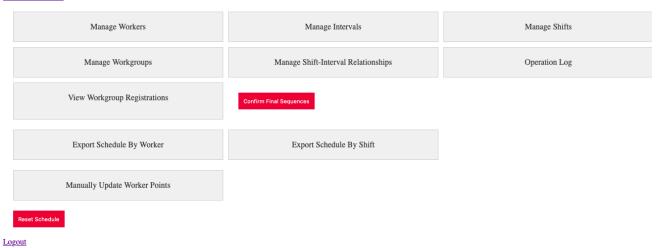


# **Data Management on Admin dashboard**

- manage data: manage worker, interval, shift, workgroup, shift-interval relationship
- operation log: record for important operations
- sample file in test\_file folder
- (shift and interval are similar, the shift-interval relationship connects the shift, interval and workgroup. The shift\_interval\_generator is designed for a week's relationship)

#### Admin Dashboard - admin

View Notifications



#### workers

# **Import Workers**

#### Back to Worker Management

Upload CSV or XLSX File:

选取文件 未选择文件

#### Upload and Preview

# **File Format Requirements**

The CSV or XLSX file must contain the following columns with the specified data types:

Column Name	Data Type	Description
id	Integer	Unique identifier for the worker (e.g., 101, 102)
name	String	Worker's full name (e.g., "John Doe")
type	String	Type of worker ("senior" or "junior")
initial_order	Integer	Initial order for scheduling (e.g., 1, 2, 3)
password	String	Worker's initial password (e.g., "pass123")

Note: Ensure all values are provided; missing or invalid data will result in errors during import.

# **Preview Worker Import**

Back to Worker Management

Confirm Impo	ort			
ID	Name	Type	Initial Order	Password
1	Allen	senior	1	111
2	Bella	senior	2	111
3	Chris	senior	3	111
4	Dan	senior	4	111
5	Eliot	junior	1	111
6	Frank	junior	2	111
7	Greco	junior	3	111
8	Heise	junior	4	111
9	Ickes	junior	5	111
10	John	junior	6	111

# **Manage Workers**

Back to I	Dashboard	Add Worker Import Workers			
ID	Name	Role	Type	Initial Order	Actions
1	Allen	worker	senior	1	Edit Delete
2	Bella	worker	senior	2	Edit Delete
3	Chris	worker	senior	3	Edit Delete
4	Dan	worker	senior	4	Edit Delete
5	Eliot	worker	junior	1	Edit Delete
6	Frank	worker	junior	2	Edit Delete
7	Greco	worker	junior	3	Edit Delete
8	Heise	worker	junior	4	Edit Delete
9	Ickes	worker	junior	5	Edit Delete
10	John	worker	junior	6	Edit Delete

# **Edit Worker**



Interval: the basic unit component for workgroups. The maximum number of senior/junior workers working at a time in work group is set here.

# **Manage Intervals**

Back	to Dashboard Ade	d Interval	Import In	tervals				
ID	Workgroup ID	Day	End Day	Start Time	End Time	Max Senior Workers	Max Junior Workers	Actions
1	1	1	1	07:00:00	11:00:00	1	2	Edit Delete
2	1	1	1	11:00:00	15:00:00	1	2	Edit Delete
3	1	1	1	15:00:00	19:00:00	1	2	Edit Delete
4	1	1	1	19:00:00	23:00:00	1	2	Edit Delete
5	1	1	2	23:00:00	07:00:00	1	2	Edit Delete
6	1	2	2	07:00:00	11:00:00	1	2	Edit Delete
7	1	2	2	11:00:00	15:00:00	1	2	Edit Delete
8	1	2	2	15:00:00	19:00:00	1	2	Edit Delete
9	1	2	2	19:00:00	23:00:00	1	2	Edit Delete
10	1	2	3	23:00:00	07:00:00	1	2	Edit Delete
11	1	3	3	07:00:00	11:00:00	1	2	Edit Delete
12	1	3	3	11:00:00	15:00:00	1	2	Edit Delete

Shift: points can be modifed as the weekends are different for each month

# **Manage Shifts**

Back to	o Dashboard	Add Shift	Import Shifts				
ID	Type	Day	End Day	Start Time	End Time	Points	Actions
1	Α	1	1	07:00:00	19:00:00	0	Edit
2	В	1	2	19:00:00	07:00:00	4	Edit Delete
3	D	1	1	07:00:00	15:00:00	0	Edit Delete
4	E	1	1	15:00:00	23:00:00	0	Edit Delete
5	N	1	2	23:00:00	07:00:00	3	Edit
6	Q	1	1	11:00:00	19:00:00	0	Edit
7	T	1	1	07:00:00	11:00:00	0	Edit Delete
8	z	1	1	15:00:00	19:00:00	0	Edit Delete
9	!	1	1	19:00:00	23:00:00	1	Edit Delete
10	#	1	1	11:00:00	23:00:00	0	Edit Delete
11	A	2	2	07:00:00	19:00:00	0	Edit Delete
12	В	2	3	19:00:00	07:00:00	4	Edit Delete

Work group (each month the worker is going to choose one from the four work group. The limits

on the number of people in the workgroup is limited here.)

# **Manage Workgroups**

Back to	Dashboard	Add Workgroup		
ID	Name	Max Senior Workers	Max Junior Workers	Actions
1	A	1	2	Edit Delete
2	В	0	3	Edit Delete
3	С	2	0	Edit Delete
4	D	1	1	Edit Delete

Shift interval relationship, which connects the interval (as basic units for shift) with shift for each workgroup.

#### **Shift-Interval Relationships**

Successfully imported 504 new relationships.

mport Relationships from File

lack to Admin Dashboard

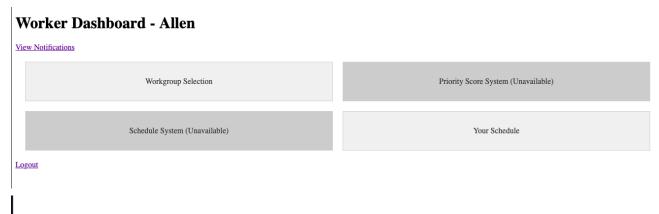
Shift ID	Shift Type	Shift Time	Workgroup	Interval ID	Interval Details	Actions
1	A	Day 1, 07:00 AM - 07:00 PM	A	1	Workgroup A, Day 1, 07:00 AM - 11:00 AM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	A	2	Workgroup A, Day 1, 11:00 AM - 03:00 PM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	A	3	Workgroup A, Day 1, 03:00 PM - 07:00 PM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	В	36	Workgroup B, Day 1, 07:00 AM - 11:00 AM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	В	37	Workgroup B, Day 1, 11:00 AM - 03:00 PM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	В	38	Workgroup B, Day 1, 03:00 PM - 07:00 PM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	С	71	Workgroup C, Day 1, 07:00 AM - 11:00 AM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	С	72	Workgroup C, Day 1, 11:00 AM - 03:00 PM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	С	73	Workgroup C, Day 1, 03:00 PM - 07:00 PM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	D	106	Workgroup D, Day 1, 07:00 AM - 11:00 AM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	D	107	Workgroup D, Day 1, 11:00 AM - 03:00 PM	Delete
1	A	Day 1, 07:00 AM - 07:00 PM	D	108	Workgroup D, Day 1, 03:00 PM - 07:00 PM	Delete
2	В	Dav 1. 07:00 PM - 07:00 AM	A	4	Workgroup A. Dav 1. 07:00 PM - 11:00 PM	Delete

# Initial schedule sign-up process

# overall process

#### workgroup choice

- · worker: dashboard workgroup selection
  - choose workgroup, only available choice allowed.



# **Choose Your Workgroup**

Select Workgroup: A (0 / 1 senior workers) Choose Workgroup

Back to Dashboard



# Choose Your Workgroup



- admin: on dashboard workgroup registration
  - notify all unregistered workers if there is anyone who is supposed to have a workgroup but is not.
  - publish in-group initial order, compulsory for the next step

#### redeem points for priority

#### Requirement:

admin publish in-group order initial orders in workgroup registration.

#### **Workgroup Registrations**

Workgroup	Senior Workers	Max Senior	Junior Workers	Max Junior
A	1	1	2	2
В	0	0	3	3
С	2	2	0	0
D	1	1	1	1

#### **Workers Without a Workgroup**

All workers have registered for a workgroup.

Publish In-Group Initial Orders

Back to Admin Dashboard

#### worker:

- · receive notification
- view in-group sequence
- redeem points to adjust the sequence

# Worker Dashboard - Allen View Notifications. Workgroup Selection Priority Score System Schedule System (Unavailable) Your Schedule Logout

# **Your Notifications**

Your in-group initial order has been published. You can now trade points for priority. - 2025-04-02 18:21:35.826080
 Mark as Read

Back to Dashboard

# **Priority Score System**

# Selected Workgroup c

Points Management
Available Points: 0
Traded Points: 0
Points to Trade: Trade Points
Points to Withdraw: Withdraw Points

Sequence Information
In Group Initial Order: 1 / 2 (1 out of 2 senior workers)
Sequence: 1 / 2
Status: pending

Back to Dashboard

 Real time sequence adjustment with point redeem worker B as an example

# **Priority Score System**

#### **Selected Workgroup**

С

Points Mana	gement
Available Points: 5	
Traded Points: 0	
Points to Trade:	Trade Points
Points to Withdraw:	(2) Withdraw Points

# **Sequence Information**

In Group Initial Order: 2 / 2 (2 out of 2 senior workers)

Sequence: 2 / 2
Status: pending

Back to Dashboard

# **Priority Score System**

#### **Selected Workgroup**

C

# Points Management Available Points: 3 Traded Points: 2 Points to Trade: Trade Points Points to Withdraw: Withdraw Points

# **Sequence Information**

In Group Initial Order: 2 / 2 (2 out of 2 senior workers)

Sequence: 1 / 2 Status: pending

Back to Dashboard

• Other's sequence (worker A) will also be adjusted.

# **Priority Score System**

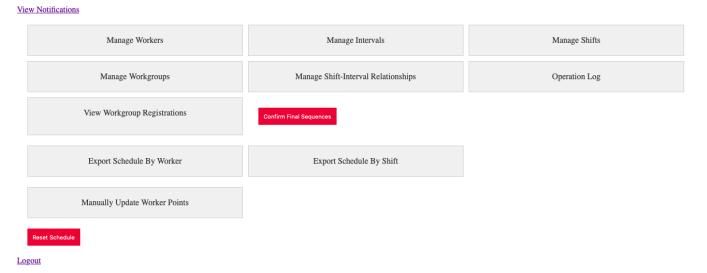
Selected Worl	<b>jroup</b>	
С		
Points Manag	ment	
Available Points: 0		
Traded Points: 0		
Points to Trade:	Trade Points	
Points to Withdraw:	(a) Withdraw Points	
Sequence Info	mation	
•	/ 2 (1 out of 2 senior workers)	
Sequence: 2 / 2		
Status: pending		

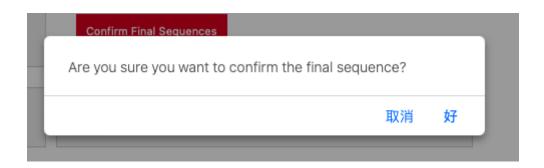
**Back to Dashboard** 

# admin confirm final sequence

schedule sequence is fixed, sequence file is exported and workers can choose the schedule

#### Admin Dashboard - admin

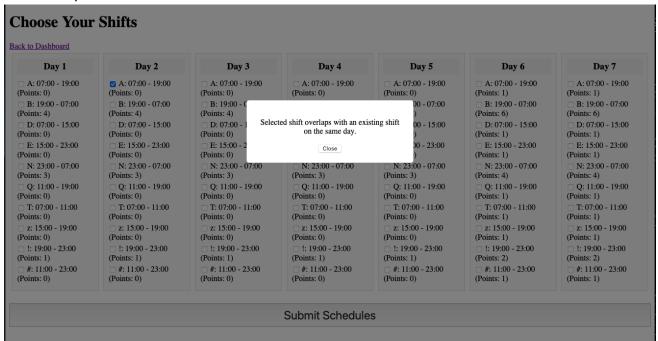




#### worker chooses the shift



conflict is prevented in real time



#### Schedule System (Unavailable)

#### Logout

worker dashboard- your schedule

#### **Your Schedule**

Day	Shift Type	Start Time	End Time	Points
1	В	19:00	07:00	4
2	Α	07:00	19:00	0
3	Α	07:00	19:00	0
4	В	19:00	07:00	4

Back to Dashboard

next worker is notified

# **Your Notifications**

- It is your turn to choose schedules. 2025-04-02 19:26:26.784561
   Mark as Read
- only available shift for choice

#### **Choose Your Shifts**



• admin will be notified when all senior/junior in a workgroup have chosen their schedule

# **Your Notifications**

- All senior workers in C have chosen their schedules. 2025-04-02 19:42:25.794857
   Mark as Read
- All senior workers in A have chosen their schedules. 2025-04-02 19:23:20.437915

Dealer Dealerand

#### export the schedule

Export Schedule By Worker	Export Schedule By Shift	Export Schedule in Spreadsheet

#### by worker

-

Worker ID	Worker Name	Shifts		
1	Allen, (A)	B: 1 19:00-07:00 A: 2 07:00-19:00 A: 3 07:00-19:00 B: 4 19:00-07:00		
2	Bella, (C)	A: 1 07:00-19:00 B: 2 19:00-07:00 A: 3 07:00-19:00 B: 4 19:00-07:00		
3	Chris, (C)	B: 1 19:00-07:00 A: 2 07:00-19:00 B: 3 19:00-07:00 A: 4 07:00-19:00		

by shift

Shift ID	Shift Type	Day	Start Time	End Time	Workers
1	А	1	07:00	19:00	Bella (C)
2	В	1	19:00	07:00	Allen (A), Chris (C)
3	D	1	07:00	15:00	None
4	E	1	15:00	23:00	None
5	N	1	23:00	07:00	None
6	Q	1	11:00	19:00	None
7	Т	1	07:00	11:00	None
8	z	1	15:00	19:00	None
9	!	1	19:00	23:00	None
10	#	1	11:00	23:00	None
11	А	2	07:00	19:00	Allen (A), Chris (C)
12	В	2	19:00	07:00	Bella (C)
13	D	2	07:00	15:00	None
14	E	2	15:00	23:00	None
15	N	2	23:00	07:00	None
16	Q	2	11:00	19:00	None
17	Т	2	07:00	11:00	None
18	z	2	15:00	19:00	None
19	!	2	19:00	23:00	None
20	#	2	11:00	23:00	None
21	А	3	07:00	19:00	Allen (A), Bella (C)
22	В	3	19:00	07:00	Chris (C)
23	D	3	07:00	15:00	None
04	г	2	15:00	22.00	None

in spreadsheet

worker name (along with the workgroup they choose)

schedule\_spreadsheet

Worker Name	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Allen (A)	В	Α	A	В	None	None	None
Bella (C)	Α	В	Α	В	None	None	None
Chris (C)	В	A	В	A	None	None	None
Dan (D)	None						

# special events & clear up for next scheduling

manually update the points if there are special events such as shift swipe and absence

#### Manually Update Worker Points

Reset Schedule

!!! Reset schedule before the next scheduling process!!!