

Flex Scheduler

Flex-Scheduler

Flexible Work-Force Scheduling Application

USER & ADMINISTRATION

GUIDE BOOK

Revision: 1.0

Date: July 31, 2022

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Purpose

The Flex Scheduler application provides an easy mechanism to create a work-force scheduler based upon simple and flexible configurations. As shown below, the application employs a divide and conquer approach toward defining a work environment through a hierarchy of Departments, Positions, Shifts, Templates (lists of shifts), and Targets (work day lists composed of templates). Once configuration is complete, the Flex-Scheduler generates a work schedule based upon configuration – comparing shift requirement, and selecting employees based upon their training and available and presents the report – all at the click of a button.

Configuration Setup Hierarchy

- Users (registration & company)
 - Departments (divisions within the company)
 - Positions (work areas within the departments)
 - Shifts (time slots for the positions)
 - Templates (header for a flexible list of shifts)
 - Template Details (the associated list of shift entries)
 - Target Week (header for work day list)
 - Target Details (lists of templates)
 - Employees (name & availability – days, hours)
 - Employees Training (list of position training for each employee)

Configuration Steps

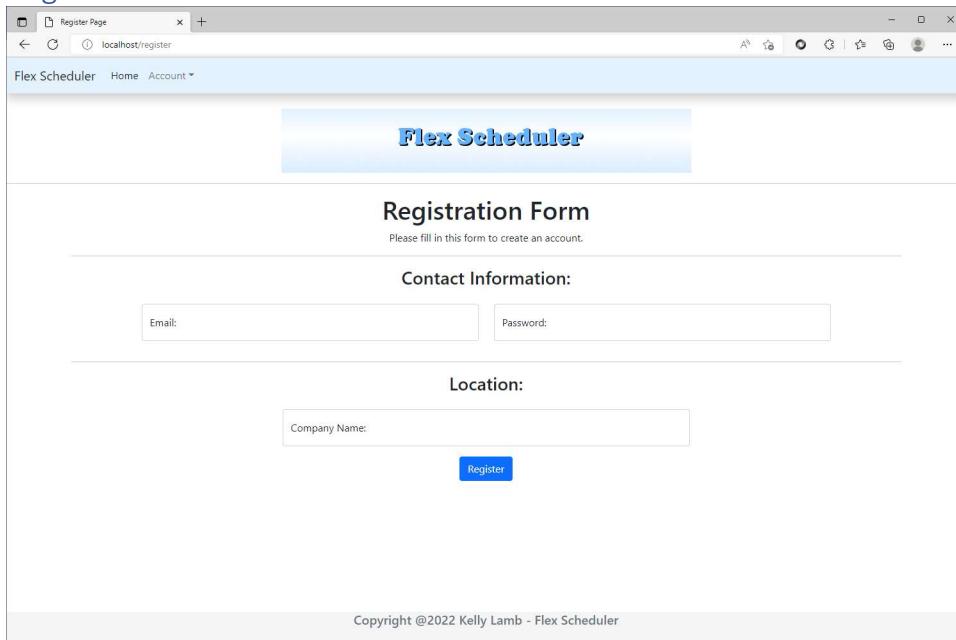
1. Create a login and company via the registration account option
2. Login to your Flex Scheduler account (email & password)
3. Define your list of departments
4. Define your list of positions for each department
5. Define you shifts for the positions (hour time slots)
6. Define templates to hold lists of shifts (be as granular as necessary)
7. Define targets (work days) to hold lists of shifts (as many as necessary)
8. Define employees (name, availability, training)

Application Hosted Site:

<https://flex-scheduler.herokuapp.com/>

Access

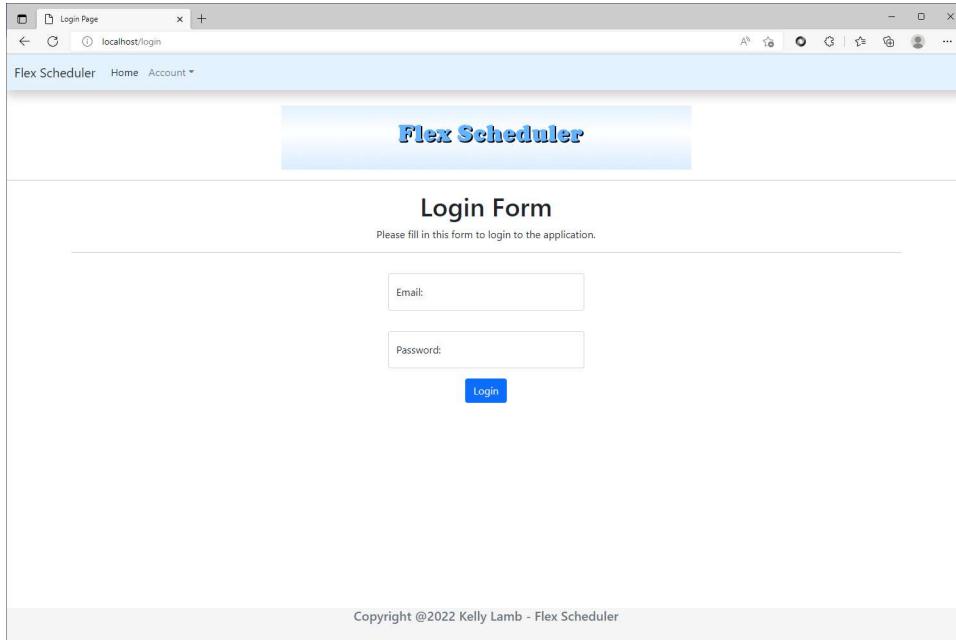
Registration



A screenshot of a web browser window titled "Register Page". The address bar shows "localhost/register". The page header includes "Flex Scheduler" and "Home Account". The main content area has a blue header bar with "Flex Scheduler". Below it is a section titled "Registration Form" with the sub-instruction "Please fill in this form to create an account." There are two input fields: "Email:" and "Password:". A section titled "Location:" contains a single input field for "Company Name". At the bottom right is a blue "Register" button. The footer of the page displays "Copyright @2022 Kelly Lamb - Flex Scheduler".

Use the Account > Registration screen to create an account.

Login



A screenshot of a web browser window titled "Login Page". The address bar shows "localhost/login". The page header includes "Flex Scheduler" and "Home Account". The main content area has a blue header bar with "Flex Scheduler". Below it is a section titled "Login Form" with the sub-instruction "Please fill in this form to login to the application." There are two input fields: "Email:" and "Password:". At the bottom right is a blue "Login" button. The footer of the page displays "Copyright @2022 Kelly Lamb - Flex Scheduler".

Use the Account > Login screen to access the application

Configuration Forms

Departments

The screenshot shows a web browser window titled "Department Listing" with the URL "localhost/departments". The page is part of the "Flex Scheduler" application, as indicated by the header and logo. The main content area is titled "Department Listing" and contains a table with two entries:

ID	Department Name	Action
1	Office	Edit Delete
2	Maintenance	Edit Delete

Below the table, there are links for "Previous" and "Next", indicating a paginated list. The footer of the page includes the copyright notice "Copyright @2022 Kelly Lamb - Flex Scheduler".

Departments – Create, View/Edit, Delete from the listing screen

The screenshot shows a web browser window titled "Department Page" with the URL "localhost/doDepartmentAction?id=1&mode=0". The page is part of the "Flex Scheduler" application. The main content area is titled "Department Details" and has a sub-instruction "Please enter department information." Below this, there is a form field labeled "Name:" containing "Office".

Under the heading "Positions:", there is a "Add" button above a table structure. The table has two rows, each with two columns: "Name:" and "Display Name:". The first row contains "General Manager" and "GM". The second row contains "Assistant Manager" and "MOD".

At the bottom of the form is a "Save Changes" button.

The footer of the page includes the copyright notice "Copyright @2022 Kelly Lamb - Flex Scheduler".

Departments – Edit, or Add/Edit/Delete associated positions in the detail screen

Positions

The screenshot shows a web browser window titled "Position Listing" with the URL "localhost/positions". The header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title bar with "Flex Scheduler", "Home", "Setup", and "Account". A "Create Position" button is visible. The main content is a table titled "Position Listing" showing five entries:

Department Name	ID	Name	Display Name	Action
Maintenance	15	Maintenance Supervisor	ML	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Maintenance	16	Maintenance Associate 1	MA1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Maintenance	19	Mechanic	Mech	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Office	13	Manager	MOD	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Office	14	Cash Controller	CC	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Below the table, it says "Showing 1 to 5 of 5 entries" and has "Previous" and "Next" buttons. At the bottom is a copyright notice: "Copyright @2022 Kelly Lamb - Flex Scheduler".

Positions – Create, View/Edit, Delete from the listing screen

The screenshot shows a web browser window titled "Position Page" with the URL "localhost/doPositionAction?d=19&mode=0". The header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title bar with "Flex Scheduler", "Home", "Setup", and "Account". The main content is titled "Position Details" with the sub-instruction "Please enter position information." It contains fields for "Department Name" (Maintenance), "Name" (Mechanic), and "Display Name" (Mech). Below these are "Shifts:" fields for "Start" (08:00 AM) and "Stop" (04:00 PM), each with an "Add" button and a delete icon. Another pair of "Start" (02:00 PM) and "Stop" (10:00 PM) fields follows. At the bottom is a "Save Changes" button.

Positions - Edit, or Add/Edit/Delete associated shifts in the detail screen

Shifts

The screenshot shows a web browser window titled "Shift Listing" at the URL "localhost/shifts". The page is titled "Flex Scheduler" and has a "Shift Listing" header. A "Create Shift" button is visible. Below is a table with columns: Department Name, Position Name, Position Display Name, ID, Start Time, Stop Time, and Action. The data shows four entries for Maintenance:

Department Name	Position Name	Position Display Name	ID	Start Time	Stop Time	Action
Maintenance	Maintenance Supervisor	ML	15	05:00:00	13:30:00	
Maintenance	Maintenance Associate 1	MA1	1	00:00:00	00:00:00	
Maintenance	Mechanic	Mech	7	08:00:00	16:00:00	
Maintenance	Mechanic	Mech	8	14:00:00	22:00:00	

Showing 1 to 4 of 4 entries

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Shifts - Create, View/Edit, Delete from the listing screen

The screenshot shows a web browser window titled "Shift Page" at the URL "localhost/doShiftAction?d=15&mode=0". The page is titled "Flex Scheduler" and has a "Shift Details" header. It says "Please enter shift information." Below are input fields for "Department Name" (Maintenance) and "Position Name" (Maintenance Supervisor). A "Shifts:" section contains two time inputs: "Start: 05:00 AM" and "Stop: 01:30 PM", each with a circular icon. A "Save Changes" button is at the bottom.

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Shifts – Edit/Delete shift time slot from details screen

Templates

The screenshot shows a web browser window titled "Template Listing" with the URL "localhost/templates". The page header includes "Flex Scheduler", "Home", "Setup", "Account", and a user icon for "Lamb Co.". The main content area is titled "Template Listing" with a "Create Template" button. It features a table with columns "ID", "Template Name", and "Action". The table contains three entries:

ID	Template Name	Action
1	Test Template 1	Edit Delete
4	Test Template 2	Edit Delete
6	Test Template 3	Edit Delete

Below the table, it says "Showing 1 to 3 of 3 entries" and has "Previous" and "Next" buttons. At the bottom, there is a copyright notice: "Copyright @2022 Kelly Lamb - Flex Scheduler".

Template - Create, View/Edit, Delete from the listing screen

The screenshot shows a web browser window titled "Template Page" with the URL "localhost/doTemplateAction?id=6&mode=0". The page header includes "Flex Scheduler", "Home", "Setup", "Account", and a user icon for "Lamb Co.". The main content area is titled "Templates" with a sub-instruction "Please enter template information." It has a form for "Template Name" (set to "Test Template 3") and a "Details:" section. The "Details:" section contains three dropdown menus for "Choose a shift":

- Maintenance - Maintenance Associate 1: 10:00-18:00 (MA1)
- Maintenance - Mechanic: 08:00-16:00 (Mech)
- Maintenance - Maintenance Supervisor: 05:00-13:30 (ML)

Each dropdown has a delete icon to its right. At the bottom, there is a "Save Changes" button and a copyright notice: "Copyright @2022 Kelly Lamb - Flex Scheduler".

Templates - Edit, or Add/Edit/Delete associated shifts in the detail screen

Template Details

The screenshot shows a web browser window titled "Template Detail Listing" with the URL "localhost/templatedetails". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title bar with "Flex Scheduler" and a "Template Detail Listing" section containing a "Create Template Detail" button. A table lists template details with columns: ID, Template Name, Department Name, Position Name, Shift, and Action. The table contains five entries, each with a "Edit" and "Delete" link. At the bottom, it says "Showing 1 to 5 of 5 entries" and has "Previous" and "Next" buttons. The footer copyright notice is "Copyright @2022 Kelly Lamb - Flex Scheduler".

ID	Template Name	Department Name	Position Name	Shift	Action
2	Test Template 1	Maintenance	Maintenance Associate 1	10:00-18:00 (MA1)	
3	Test Template 2	Maintenance	Mechanic	08:00-16:00 (Mech)	
5	Test Template 3	Maintenance	Maintenance Associate 1	10:00-18:00 (MA1)	
6	Test Template 3	Maintenance	Mechanic	08:00-16:00 (Mech)	
8	Test Template 3	Maintenance	Maintenance Associate 1	10:00-18:00 (MA1)	

Template Details – Create, View/Edit, Delete from the listing screen

The screenshot shows a web browser window titled "Template Detail Page" with the URL "localhost/doTemplateDetailAction?id=8&mode=0". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title bar with "Flex Scheduler" and a "Template Detail" section containing a note "Please enter template detail information.". There are several input fields: "Target Week Name: Test Template 3", "Department Name: Maintenance", "Position Name: Maintenance Associate 1", "Display Name: MA1", "Start: 10:00 AM", and "Stop: 06:00 PM". The footer copyright notice is "Copyright @2022 Kelly Lamb - Flex Scheduler".

Template Details – View Details in the detail screen

Target Week

The screenshot shows a web browser window titled "Target Week Listing" with the URL "localhost/targetweek". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title "Flex Scheduler" and a section titled "Target Week Listing" with a "Create Target Week" button. A table displays target week entries:

ID	Name	Day Number	Action
1	Monday	1	Edit Delete
2	Tuesday	2	Edit Delete
4	Wednesday	3	Edit Delete

Below the table, it says "Showing 1 to 3 of 3 entries" and has navigation buttons for "Previous" (disabled), "1", and "Next". At the bottom, it says "Copyright @2022 Kelly Lamb - Flex Scheduler".

Target Week – Create, View/Edit, Delete days for the target week

The screenshot shows a web browser window titled "Target Week Page" with the URL "localhost/doTargetWeekAction?id=1&mode=0". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title "Flex Scheduler" and a section titled "Target Week" with the sub-instruction "Please enter target week information.".

The form fields include:

- "Target Week Name:" input field containing "Monday" with a "Day" dropdown set to "1".
- A "Templates:" section with an "Add" button. It lists two templates:
 - "Template Name: Test Template 1" with edit and delete icons.
 - "Template Name: Test Template 2" with edit and delete icons.
- A "Save Changes" button at the bottom.

At the bottom, it says "Copyright @2022 Kelly Lamb - Flex Scheduler".

Target Week – Edit, or Add/Delete templates (details) from the detail screen

Target Week Details

The screenshot shows a web browser window titled "Target Week Detail Listing" with the URL "localhost/targetweekdetails". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a section titled "Target Week Detail Listing" with a "Create Target Week Detail" button. A table displays four entries:

ID	Target Name	Target Day	Template Name	Action
1	Monday	1	Test Template 1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
3	Monday	1	Test Template 2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
12	Tuesday	2	Test Template 2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
13	Wednesday	3	Test Template 2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Below the table, it says "Showing 1 to 4 of 4 entries" and has "Previous" and "Next" buttons. At the bottom is a copyright notice: "Copyright @2022 Kelly Lamb - Flex Scheduler".

Target Week Details – Create, View/Edit, Delete from the listing screen

The screenshot shows a web browser window titled "Target Week Detail Page" with the URL "localhost/createTargetWeekDetail". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a section titled "Target Week Detail" with the sub-instruction "Please enter target week detail information." There are two dropdown menus:

- "Choose an target:" dropdown showing "Monday - 1"
- "Choose a template name:" dropdown showing "Test Template 1"

A "Save Changes" button is located at the bottom of the form area. At the very bottom is a copyright notice: "Copyright @2022 Kelly Lamb - Flex Scheduler".

Target Week Details – View/Edit templates for the target day

Employees

The screenshot shows a web browser window titled "Employee Listing" with the URL "localhost/employees". The page header includes "Flex Scheduler", "Home", "Setup", "Account", and a "Lamb Co." logo. The main content area is titled "Employee Listing" with a "Create Employee" button. A table displays employee data with columns: ID, Dept Name, Name, Available 1, Available 2, Available 3, Available 4, Available 5, Available 6, Available 7, and Action. Two entries are shown: Kelly Lamb and Ashley Lamb, both assigned to the "Office" department. The table includes search and pagination controls. At the bottom, a copyright notice reads "Copyright @2022 Kelly Lamb - Flex Scheduler".

Employees – Create, View/Edit, Delete employees from the listing screen

The screenshot shows a web browser window titled "Employee Page" with the URL "localhost/doEmployeeAction?id=1&mode=0". The page header includes "Flex Scheduler", "Home", "Setup", "Account", and a "Lamb Co." logo. The main content area is titled "Employee Details" with a note "Please enter employee information." It features two input fields: "Employee Name: Kelly Lamb" and "Choose a department name: Office". Below is a grid for scheduling availability across four days (1-4). The grid has columns for "Day", "Available" (checkbox), "Start" (time input), and "Stop" (time input). For each day, the "Available" checkbox is checked, and the times are set to 12:00 AM and 11:59 PM respectively.

Employees Detail – Create, Edit/View name and availability in detail screen

Employees Training

The screenshot shows a web browser window titled "Employee Training Listing" with the URL "localhost/employeestraining". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title "Employee Training Listing" and a "Create Employee Training" button. A table displays employee training data with columns: ID, Department Name, Employee Name, Position Name, and Action. The data shows two entries: ID 1, Department Office, Employee Kelly Lamb, Position Manager; ID 2, Department Office, Employee Ashley Lamb, Position Cash Controller. The table includes pagination showing 1 to 2 of 2 entries. At the bottom is a copyright notice: "Copyright @2022 Kelly Lamb - Flex Scheduler".

Employee Training – Create, View/Edit, Delete training from the listing screen

The screenshot shows a web browser window titled "Employee Training Page" with the URL "localhost/doEmployeeTrainingAction?id=1&mode=0". The page header includes "Flex Scheduler" and "Lamb Co.". Below the header is a title "Employee Training Details" with a sub-instruction "Please enter employee position training information.". A section labeled "Training:" contains a "Add" button and two dropdown menus under "Department:". The first dropdown shows "Office" and the second shows "Manager". Below these are two dropdown menus for "Choose a department-position name": the first shows "Office-Cash Controller" and the second shows "Maintenance-Maintenance Supervisor". At the bottom is a "Save Changes" button and a copyright notice: "Copyright @2022 Kelly Lamb - Flex Scheduler".

Employee Training – Create, View, Delete training positions from the detail screen

Report – Schedule Generation

The screenshot shows a web browser window titled "Report Generation" with the URL "localhost/schedule". The page header includes "Flex Scheduler" and navigation links for "Home", "Setup", and "Account". A "Fun Park" button is visible in the top right. The main content area features a blue header bar with "Flex Scheduler" and a "Report Generation" section below it. A prominent blue "Create Schedule" button is centered. At the bottom, a copyright notice reads "Copyright @2022 Kelly Lamb - Flex Scheduler".

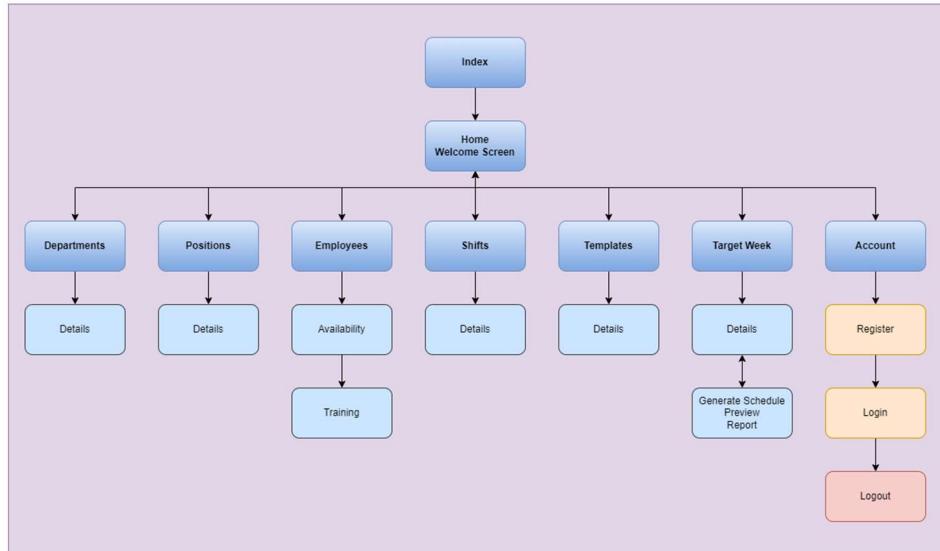
Schedule Generator – Click “Create Schedule” to generate report

The screenshot shows a web browser window titled "Report Listing" with the URL "localhost/createSchedule". The page header includes "Flex Scheduler" and navigation links for "Home", "Setup", and "Account". A "Fun Park" button is visible in the top right. The main content area features a blue header bar with "Flex Scheduler" and a "Report Listing - Schedule" section below it. Below this is a table showing a weekly schedule for various employees across different departments. The table has columns for Department, Employee, and days of the week (Mon through Sun). The data includes shifts like "08:00-16:00 Mech" and "06:00-14:00 Asst". At the bottom, a copyright notice reads "Copyright @2022 Kelly Lamb - Flex Scheduler".

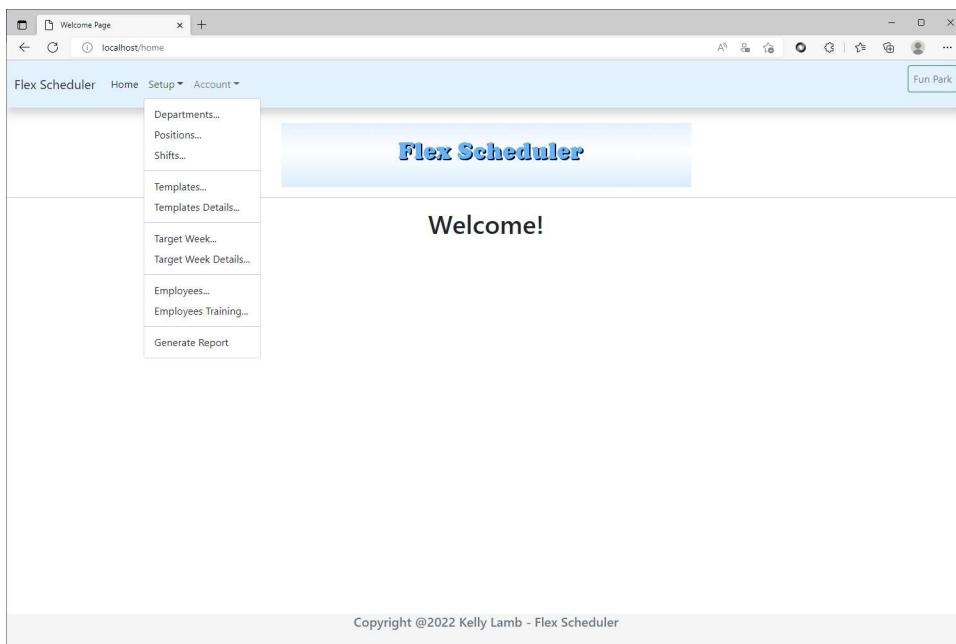
Department	Employee	Mon	Tue	Wed	Thur	Fri	Sat	Sun
Maintenance	Kenneth Schweizing	08:00-16:00 Mech	---	---				
Maintenance	Luis Aparicio	06:00-14:00 Asst	---	---				
Maintenance	Pancho Padilla	06:00-14:00 Lead	---	---				
Office	Ashley Lamb	15:00-23:00 MOD	15:00-23:00 MOD	15:00-23:00 MOD				
Office	Kelly Lamb	06:00-18:00 GM	06:00-18:00 GM	06:00-18:00 GM				

Example of generated report schedule

Navigation



Navigation - Site Map



Menu – Setup Options