

# **Flex Scheduler**

Flex-Scheduler

Flexible Work-Force Scheduling Application

USER & ADMINISTRATION

GUIDE BOOK

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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

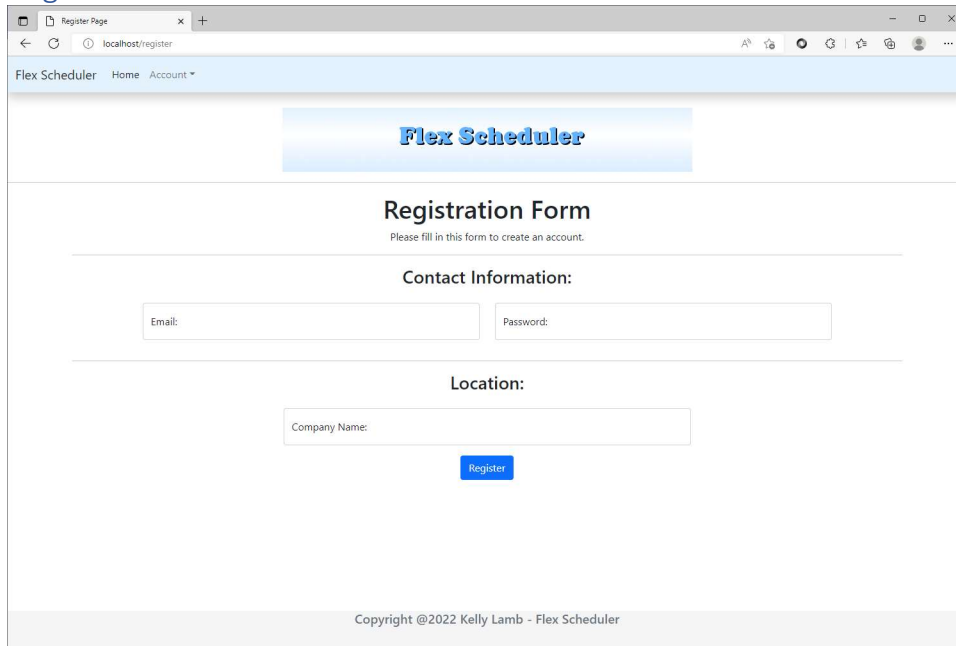
1. Create a login and company via the registration account option
2. Login to your Flex Scheduler account (email & password)
3. Define your list of departments
4. Define your list of positions for each department
5. Define you shifts for the positions (hour time slots)
6. Define templates to hold lists 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

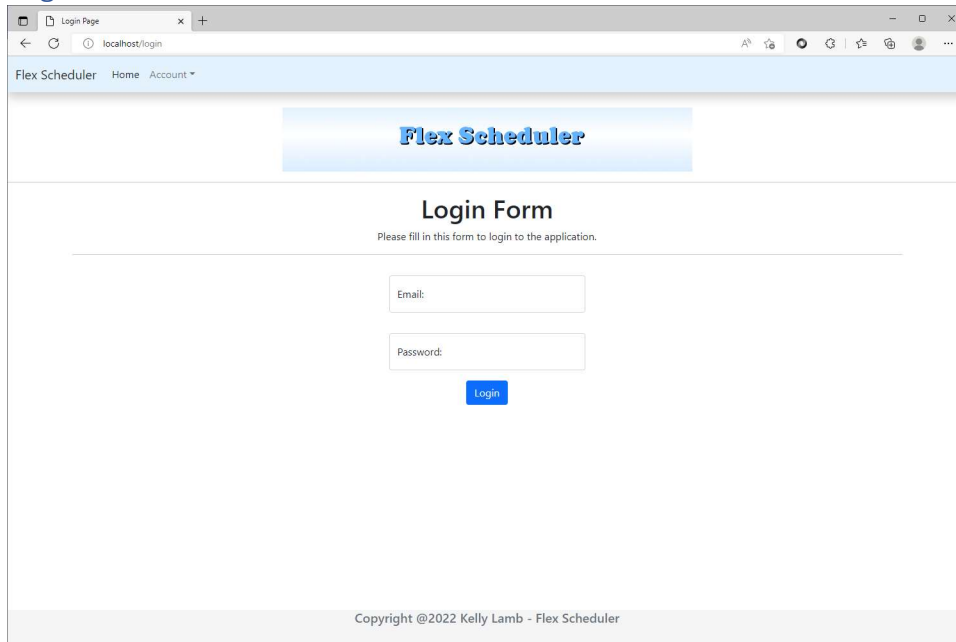
### Registration



The screenshot shows a web browser window with the address bar displaying 'localhost/register'. The page has a light blue header with 'Flex Scheduler' and navigation links 'Home' and 'Account'. Below the header is a blue banner with the 'Flex Scheduler' logo. The main content area is titled 'Registration Form' with the instruction 'Please fill in this form to create an account.' Below this is a section for 'Contact Information:' containing two input fields: 'Email:' and 'Password:'. A second section for 'Location:' contains a 'Company Name:' input field. A blue 'Register' button is positioned below the 'Company Name' field. The footer of the page contains the text 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

Use the Account > Registration screen to create an account.

### Login



The screenshot shows a web browser window with the address bar displaying 'localhost/login'. The page has a light blue header with 'Flex Scheduler' and navigation links 'Home' and 'Account'. Below the header is a blue banner with the 'Flex Scheduler' logo. The main content area is titled 'Login Form' with the instruction 'Please fill in this form to login to the application.' Below this are two input fields: 'Email:' and 'Password:'. A blue 'Login' button is positioned below the 'Password' field. The footer of the page contains the text 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

Use the Account > Login screen to access the application

# Configuration Forms

## Departments

The screenshot shows the 'Department Listing' page in the Flex Scheduler application. The page has a light blue header with the 'Flex Scheduler' logo and navigation links: 'Home', 'Setup', 'Account', and a 'Fun Park' button. Below the header, the title 'Department Listing' is centered, with a 'Create Department' button underneath. A table lists the departments, with columns for 'ID', 'Department Name', and 'Action'. The table contains two entries: 'Office' (ID 1) and 'Maintenance' (ID 2). Each entry has edit and delete icons in the 'Action' column. A search bar is located to the right of the table. At the bottom, there are pagination controls showing 'Showing 1 to 2 of 2 entries' and 'Previous 1 Next'. The footer contains the copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

ID	Department Name	Action
1	Office	<a href="#">Edit</a> <a href="#">Delete</a>
2	Maintenance	<a href="#">Edit</a> <a href="#">Delete</a>

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

The screenshot shows the 'Department Details' page in the Flex Scheduler application. The page has a light blue header with the 'Flex Scheduler' logo and navigation links: 'Home', 'Setup', 'Account', and a 'Fun Park' button. Below the header, the title 'Department Details' is centered, with the instruction 'Please enter department information.' underneath. A form for entering department information is displayed. It includes a 'Name' field with the value 'Office'. Below this, there is a 'Positions:' section with an 'Add' button. The 'Positions' section contains two rows of input fields: 'Name' and 'Display Name'. The first row has 'General Manager' for Name and 'GM' for Display Name. The second row has 'Assistant Manager' for Name and 'MOD' for Display Name. Each row has a delete icon to its right. At the bottom of the form is a 'Save Changes' button. The footer contains the copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

Positions:

Name	Display Name	Action
General Manager	GM	<a href="#">Delete</a>
Assistant Manager	MOD	<a href="#">Delete</a>

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

## Positions

The screenshot shows the 'Position Listing' screen in the Flex Scheduler application. The browser address bar shows 'localhost/positions'. The page has a navigation bar with 'Flex Scheduler', 'Home', 'Setup', 'Account', and a 'Lamb Co.' button. Below the navigation bar is a blue banner with the 'Flex Scheduler' logo. The main heading is 'Position Listing' with a 'Create Position' button. Below this is a table with 5 entries. The table has columns: Department Name, ID, Name, Display Name, and Action. The entries are: Maintenance (ID 15, Name Maintenance Supervisor, Display Name ML), Maintenance (ID 16, Name Maintenance Associate 1, Display Name MA1), Maintenance (ID 19, Name Mechanic, Display Name Mech), Office (ID 13, Name Manager, Display Name MOD), and Office (ID 14, Name Cash Controller, Display Name CC). Each entry has an edit and delete icon in the Action column. Below the table, it says 'Showing 1 to 5 of 5 entries' and 'Previous 1 Next'. The footer says 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

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

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

The screenshot shows the 'Position Details' screen in the Flex Scheduler application. The browser address bar shows 'localhost/doPositionAction?id=19&mode=0'. The page has a navigation bar with 'Flex Scheduler', 'Home', 'Setup', 'Account', and a 'Lamb Co.' button. Below the navigation bar is a blue banner with the 'Flex Scheduler' logo. The main heading is 'Position Details' with the instruction 'Please enter position information.' Below this is a form with fields for 'Department Name' (Maintenance), 'Name' (Mechanic), and 'Display Name' (Mech). There is an 'Add' button under the 'Shifts:' heading. Below this are two rows of shift information, each with a 'Start' and 'Stop' time field and a clock icon. The first row shows 'Start: 08:00 AM' and 'Stop: 04:00 PM'. The second row shows 'Start: 02:00 PM' and 'Stop: 10:00 PM'. There are delete icons next to each shift row. At the bottom is a 'Save Changes' button. The footer says 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

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

## Shifts

The screenshot shows the 'Shift Listing' page in the Flex Scheduler application. The page has a light blue header with navigation links: 'Flex Scheduler', 'Home', 'Setup', and 'Account'. A 'Lamb Co.' button is in the top right. Below the header is a large blue button labeled 'Flex Scheduler'. The main content area is titled 'Shift Listing' and includes a 'Create Shift' button. A table displays a list of shifts with columns: Department Name, Position Name, Position Display Name, ID, Start Time, Stop Time, and Action. The table shows four entries for the 'Maintenance' department. Below the table, it says 'Showing 1 to 4 of 4 entries' and has 'Previous', '1', and 'Next' pagination controls. The footer contains the copyright notice: 'Copyright ©2022 Kelly Lamb - Flex Scheduler'.

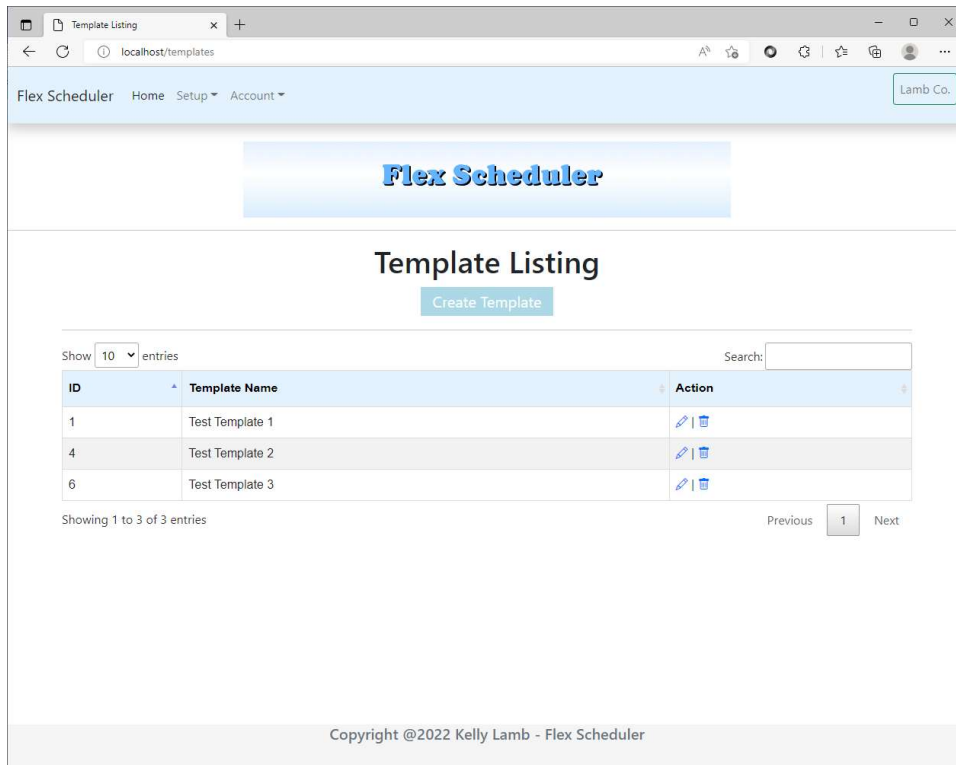
Department Name	Position Name	Position Display Name	ID	Start Time	Stop Time	Action
Maintenance	Maintenance Supervisor	ML	15	05:00:00	13:30:00	<a href="#">Edit</a> <a href="#">Delete</a>
Maintenance	Maintenance Associate 1	MA1	1	00:00:00	00:00:00	<a href="#">Edit</a> <a href="#">Delete</a>
Maintenance	Mechanic	Mech	7	08:00:00	16:00:00	<a href="#">Edit</a> <a href="#">Delete</a>
Maintenance	Mechanic	Mech	8	14:00:00	22:00:00	<a href="#">Edit</a> <a href="#">Delete</a>

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

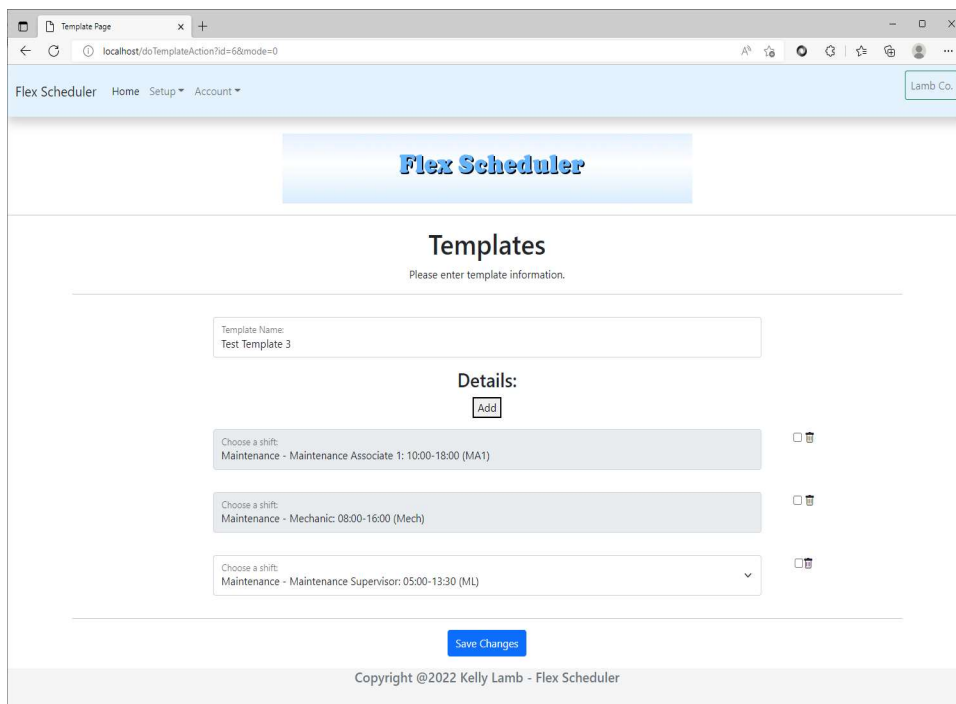
The screenshot shows the 'Shift Details' page in the Flex Scheduler application. The page has the same header as the listing screen. Below the header is a large blue button labeled 'Flex Scheduler'. The main content area is titled 'Shift Details' and includes the instruction 'Please enter shift information.' Below this, there are two input fields: 'Department Name' with the value 'Maintenance' and 'Position Name' with the value 'Maintenance Supervisor'. Underneath these is a 'Shifts:' section with two time slots: 'Start: 05:00 AM' and 'Stop: 01:30 PM'. Each time slot has a clock icon to its right. To the right of the 'Stop' time slot is a trash can icon. At the bottom of the form is a blue 'Save Changes' button. The footer contains the copyright notice: 'Copyright ©2022 Kelly Lamb - Flex Scheduler'.

Shifts – Edit/Delete shift time slot from details screen

## Templates



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



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



## Template Details

The screenshot shows the 'Template Detail Listing' page in the Flex Scheduler application. The page has a light blue header with the 'Flex Scheduler' logo and navigation links: 'Flex Scheduler', 'Home', 'Setup', and 'Account'. A 'Lamb Co.' button is in the top right. Below the header, the page title 'Template Detail Listing' is centered, with a 'Create Template Detail' button underneath. A table lists template details with columns: ID, Template Name, Department Name, Position Name, Shift, and Action. The table contains 8 entries, with the first 5 visible. Below the table, it says 'Showing 1 to 5 of 5 entries' and has 'Previous', '1', and 'Next' navigation links. The footer contains the copyright notice: '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)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
3	Test Template 2	Maintenance	Mechanic	08:00-16:00 (Mech)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
5	Test Template 3	Maintenance	Maintenance Associate 1	10:00-18:00 (MA1)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
6	Test Template 3	Maintenance	Mechanic	08:00-16:00 (Mech)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
8	Test Template 3	Maintenance	Maintenance Associate 1	10:00-18:00 (MA1)	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

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

The screenshot shows the 'Template Detail' page in the Flex Scheduler application. The page has a light blue header with the 'Flex Scheduler' logo and navigation links: 'Flex Scheduler', 'Home', 'Setup', and 'Account'. A 'Lamb Co.' button is in the top right. Below the header, the page title 'Template Detail' is centered, with the instruction 'Please enter template detail information.' underneath. The form contains 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 contains the copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

### Template Details – View Details in the detail screen

## Target Week

The screenshot shows the 'Target Week Listing' page in the Flex Scheduler application. The page has a light blue header with navigation links: 'Flex Scheduler', 'Home', 'Setup', and 'Account'. A 'Lamb Co.' logo is in the top right. Below the header is a large blue banner with the text 'Flex Scheduler'. The main content area is titled 'Target Week Listing' and includes a 'Create Target Week' button. Below this is a table with columns: 'ID', 'Name', 'Day Number', and 'Action'. The table contains three entries: Monday (ID 1), Tuesday (ID 2), and Wednesday (ID 4). Each entry has edit and delete icons in the 'Action' column. Below the table, it says 'Showing 1 to 3 of 3 entries' and 'Previous 1 Next'. At the bottom, there is a copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

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

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

The screenshot shows the 'Target Week' detail page in the Flex Scheduler application. The page has a light blue header with navigation links: 'Flex Scheduler', 'Home', 'Setup', and 'Account'. A 'Lamb Co.' logo is in the top right. Below the header is a large blue banner with the text 'Flex Scheduler'. The main content area is titled 'Target Week' and includes the text 'Please enter target week information.' Below this is a form with two input fields: 'Target Week Name' (containing 'Monday') and 'Day' (containing '1'). Below the form is a section titled 'Templates:' with an 'Add' button. There are two template entries: 'Test Template 1' and 'Test Template 2', each with a delete icon. At the bottom, there is a 'Save Changes' button. At the bottom, there is a copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

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

## Target Week Details

The screenshot shows the 'Target Week Detail Listing' page. At the top, there's a navigation bar with 'Flex Scheduler', 'Home', 'Setup', and 'Account' links, and a 'Lamb Co.' button. Below the navigation bar is a large blue banner with the 'Flex Scheduler' logo. The main heading is 'Target Week Detail Listing', followed by a 'Create Target Week Detail' button. Below this is a table with 5 columns: ID, Target Name, Target Day, Template Name, and Action. The table contains 4 entries. Below the table, it says 'Showing 1 to 4 of 4 entries' and 'Previous 1 Next'. At the bottom, there's a copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

ID	Target Name	Target Day	Template Name	Action
1	Monday	1	Test Template 1	<a href="#">View</a> <a href="#">Delete</a>
3	Monday	1	Test Template 2	<a href="#">View</a> <a href="#">Delete</a>
12	Tuesday	2	Test Template 2	<a href="#">View</a> <a href="#">Delete</a>
13	Wednesday	3	Test Template 2	<a href="#">View</a> <a href="#">Delete</a>

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

The screenshot shows the 'Target Week Detail' page. At the top, there's a navigation bar with 'Flex Scheduler', 'Home', 'Setup', and 'Account' links, and a 'Lamb Co.' button. Below the navigation bar is a large blue banner with the 'Flex Scheduler' logo. The main heading is 'Target Week Detail', followed by the text 'Please enter target week detail information.' Below this is a form with two dropdown menus: 'Choose an target:' with 'Monday - 1' selected, and 'Choose a template name:' with 'Test Template 1' selected. Below the form is a 'Save Changes' button. At the bottom, there's a copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

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

## Employees

The screenshot shows the 'Employee Listing' page in the Flex Scheduler application. The page has a light blue header with navigation links: 'Flex Scheduler', 'Home', 'Setup', and 'Account'. A 'Lamb Co.' button is in the top right. Below the header is a large blue button labeled 'Flex Scheduler'. The main content area is titled 'Employee Listing' and includes a 'Create Employee' button. A table lists two employees: Kelly Lamb (ID 1, Office) and Ashley Lamb (ID 2, Office). The table has columns for ID, Dept Name, Name, and seven 'Available' checkboxes. Kelly Lamb is available on all days, while Ashley Lamb is available on days 2 through 7. Each row has an 'Action' column with edit and delete icons. Below the table, it says 'Showing 1 to 2 of 2 entries' and 'Previous 1 Next'. A copyright notice at the bottom reads 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

ID	Dept Name	Name	Available 1	Available 2	Available 3	Available 4	Available 5	Available 6	Available 7	Action
1	Office	Kelly Lamb	Yes	Yes	Yes	Yes	Yes	--	--	<a href="#">Edit</a> <a href="#">Delete</a>
2	Office	Ashley Lamb	--	--	Yes	Yes	Yes	Yes	Yes	<a href="#">Edit</a> <a href="#">Delete</a>

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

The screenshot shows the 'Employee Details' page in the Flex Scheduler application. The page has the same header as the listing page. Below the header is a large blue button labeled 'Flex Scheduler'. The main content area is titled 'Employee Details' and includes the text 'Please enter employee information.' Below this is a form with two input fields: 'Employee Name' (containing 'Kelly Lamb') and 'Choose a department name' (a dropdown menu with 'Office' selected). Below the form is a table with four rows, each representing a day (1-4). Each row has columns for 'Day', 'Available' (a checkbox), 'Start' (a time picker set to '12:00 AM'), and 'Stop' (a time picker set to '11:59 PM'). All 'Available' checkboxes are checked.

Day	Available	Start	Stop
1	<input checked="" type="checkbox"/>	12:00 AM	11:59 PM
2	<input checked="" type="checkbox"/>	12:00 AM	11:59 PM
3	<input checked="" type="checkbox"/>	12:00 AM	11:59 PM
4	<input checked="" type="checkbox"/>	12:00 AM	11:59 PM

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

## Employees Training

The screenshot shows the 'Employee Training Listing' page. At the top, there's a navigation bar with 'Flex Scheduler', 'Home', 'Setup', and 'Account' links, and a 'Lamb Co.' button. Below the navigation bar is a large blue banner with the text 'Flex Scheduler'. The main heading is 'Employee Training Listing', followed by a 'Create Employee Training' button. Below this is a table with columns: ID, Department Name, Employee Name, Position Name, and Action. The table contains two entries: 1. ID: 1, Department Name: Office, Employee Name: Kelly Lamb, Position Name: Manager, Action: [Edit] [Delete]. 2. ID: 2, Department Name: Office, Employee Name: Ashley Lamb, Position Name: Cash Controller, Action: [Edit] [Delete]. Below the table, it says 'Showing 1 to 2 of 2 entries' and 'Previous 1 Next'. At the bottom, there is a copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

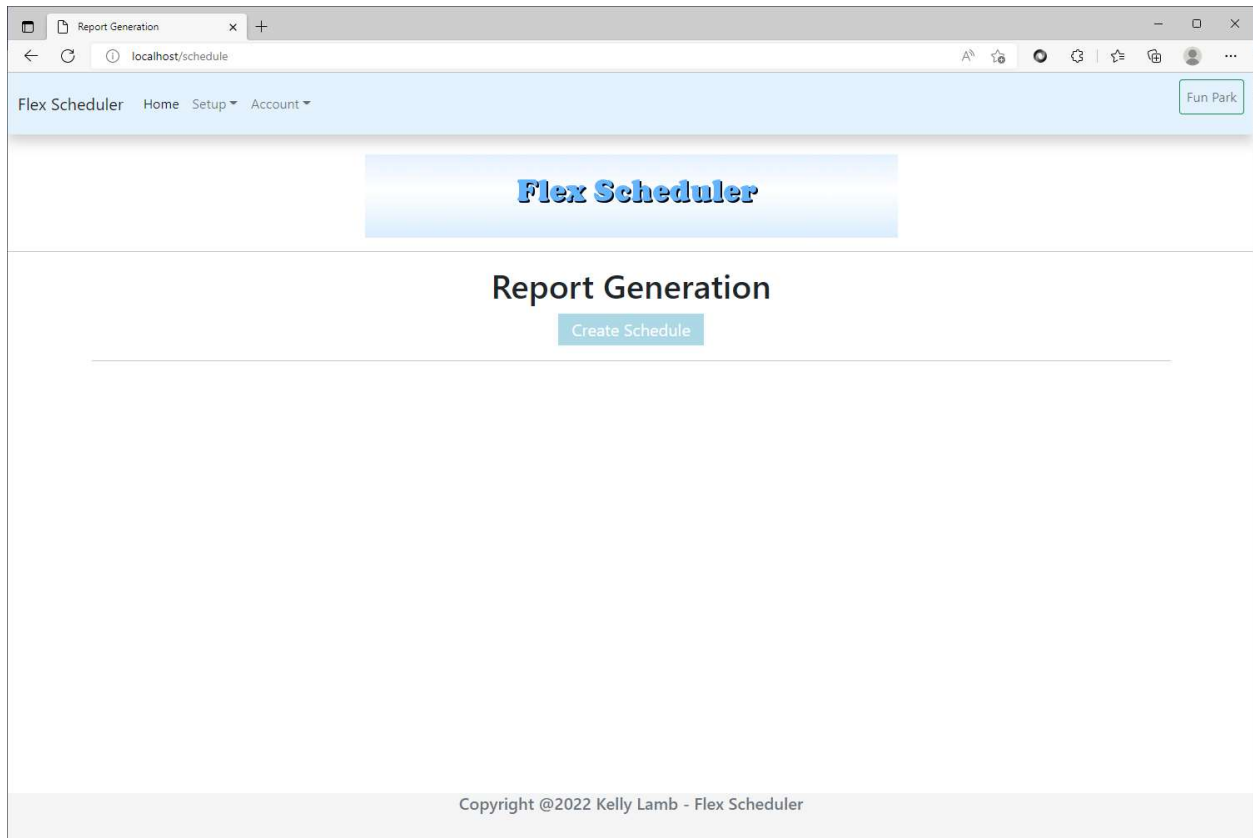
ID	Department Name	Employee Name	Position Name	Action
1	Office	Kelly Lamb	Manager	[Edit] [Delete]
2	Office	Ashley Lamb	Cash Controller	[Edit] [Delete]

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

The screenshot shows the 'Employee Training Details' page. At the top, there's a navigation bar with 'Flex Scheduler', 'Home', 'Setup', and 'Account' links, and a 'Lamb Co.' button. Below the navigation bar is a large blue banner with the text 'Flex Scheduler'. The main heading is 'Employee Training Details', followed by the instruction 'Please enter employee position training information.' Below this is a form with the following fields: 'Employee Name' (text input, value: Kelly Lamb), 'Training:' (section header), 'Add' (button), 'Department' (text input, value: Office), 'Department' (text input, value: Manager), 'Choose a department-position name' (dropdown menu, value: Office-Cash Controller), 'Choose a department-position name' (dropdown menu, value: Maintenance-Maintenance Supervisor), and 'Save Changes' (button). At the bottom, there is a copyright notice: 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

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

## Report – Schedule Generation



Schedule Generator – Click “Create Schedule” to generate report

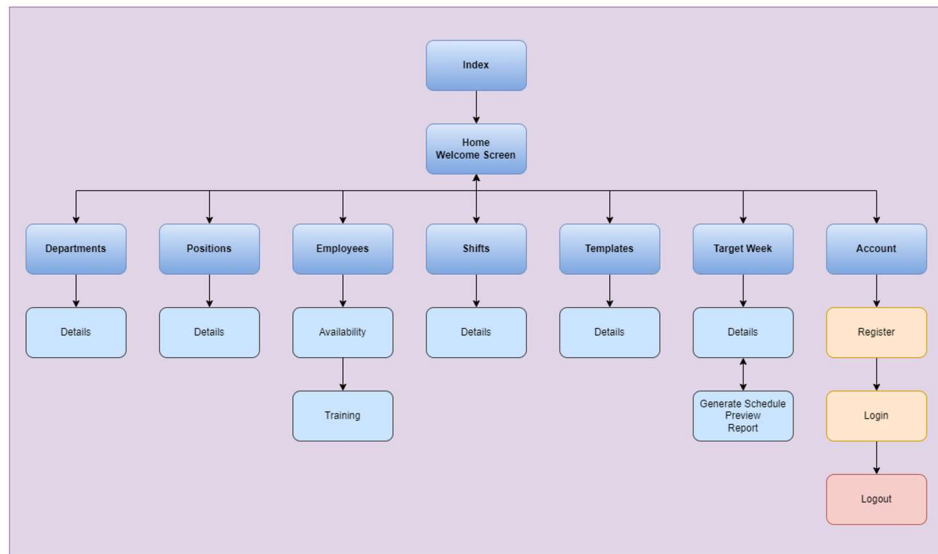
The screenshot shows a web browser window with the address bar displaying 'localhost/createSchedule'. The page has a light blue header with the text 'Flex Scheduler' and navigation links 'Home', 'Setup', and 'Account'. A 'Fun Park' button is in the top right. The main content area features a large blue button labeled 'Flex Scheduler' and a section titled 'Report Listing - Schedule' containing a table with employee schedules.

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

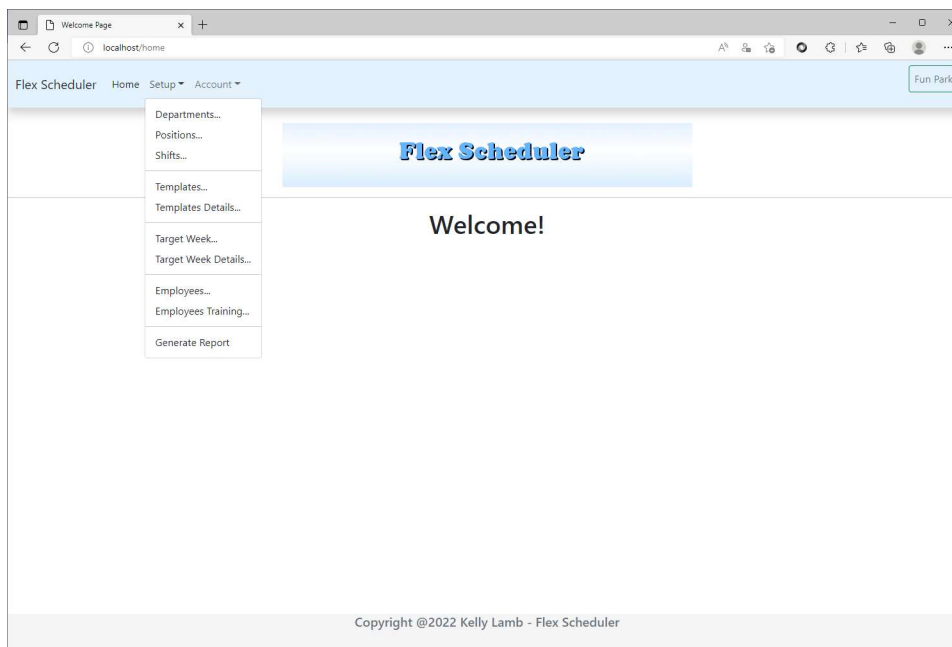
The footer contains the text 'Copyright @2022 Kelly Lamb - Flex Scheduler'.

Example of generated report schedule

## Navigation



## Navigation - Site Map



## Menu – Setup Options