Timeline Planner – Standard Operating Procedure (SOP) / User Guide

1. Purpose

The Timeline Planner is a tool designed to generate a detailed bootcamp or curriculum timeline from a CSV file. It calculates module start and end dates while automatically skipping weekends, South African public holidays, and a defined December shutdown period.

This document explains how to prepare input files, upload them, and interpret the output results.

2. Input Requirements

2.1 Modules CSV File

Your CSV must include the following columns:

Column Header	Data Type / Notes
Program Start Date	YYYY-MM-DD (e.g., 2026-02-02). Only needs a value in the first row.
Dec Shutdown Start	YYYY-MM-DD (e.g., 2026-12-18). The last workday is the day before this date.
Dec Shutdown End	YYYY-MM-DD (e.g., 2027-01-04). The first workday of the new year is this date.
Block/Module Name	The name of the curriculum item (e.g., Module 1 - Onboarding)
Duration	The length of the module (number of units).
Unit	Must be either days (5-day work week) or weeks (5 working days per week).

2.2 Optional Holidays CSV

- Include a single column named `date`.

- Dates should be in `YYYY-MM-DD` format.

- These holidays will also be skipped in the timeline calculation.

3. Using the Timeline Planner

3.1 Access the Tool

1. Open the web application (e.g., `http://localhost:5000` for local Flask deployment).

2. On the home page, select the **Modules CSV file** to upload.

3. (Optional) Select a **Holidays CSV file**.

4. Enter the **Start Date** if not already in the CSV.

5. Click **Submit** to generate the timeline.

3.2 Understanding the Output

The output is displayed as a table on the results page and can also be downloaded as `timeline_output.csv`.

Column	Description
Module	The name of the curriculum block/module.
Start Date	Calculated start date of the module (skipping weekends, holidays, shutdown).
End Date	Calculated end date of the module.
Duration (days)	Total number of working days calculated for the module.
Unit	Original time unit provided in the CSV (`days` or `weeks`).

3.3 Downloading Results

- Download our example CSV to get started, click **Download CSV** to save a copy of the CSV file example.

- Open the CSV in Excel, Google Sheets, or any other spreadsheet program for further analysis or reporting.

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4. Error Handling

- Ensure the CSV column headers match exactly as specified.

- Check that dates are in the `YYYY-MM-DD` format.

- If no data appears, confirm that the CSV is not empty and the start date is valid.

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5. Tips for Best Results

- Keep module durations realistic and consistent with the bootcamp schedule.

- Use the optional holidays file to account for local events or organizational off-days.

- Verify output dates against known holidays and shutdown periods for accuracy.