

ORTEC Workforce Scheduling 7

Implementation Manual Module Shift Bidding

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1 Introduction

Due to circumstances such as last-minute absence or work that wasn't planned at the time of publishing the schedule, additional shifts can become available. The planner or manager can mark these shifts to be available for employees to choose from.

The **Shift Bidding** module provides flexibility in how open shifts are offered and assigned. Within this module, organizations can choose between two shift allocation methods: Shift Picking and Shift Bidding. Both methods are part of the same module, but they differ in how shifts are claimed and finalized.

- Shift Picking and Shift Bidding cannot be combined for the same employee.
- Different departments within the same organization may use different methods.

1.1 Shift Picking

With Shift Picking, open shifts can be taken directly by employees.

- Employees select an available shift themselves.
- Once selected, the shift is immediately and definitively assigned.
- Allocation is based on a first come, first served principle.
- No planner intervention is required.

This method provides maximum autonomy for employees and is suitable when speed and simplicity are the main priorities.

1.2 Shift Bidding

With Shift Bidding, employees express interest in shifts rather than claiming them directly.

- Employees can indicate that they want to work a specific shift.
- Multiple employees may bid for the same shift.

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- Shifts are not assigned immediately.
- A planner makes the final assignment based on suitability, such as qualifications, experience, and workload.

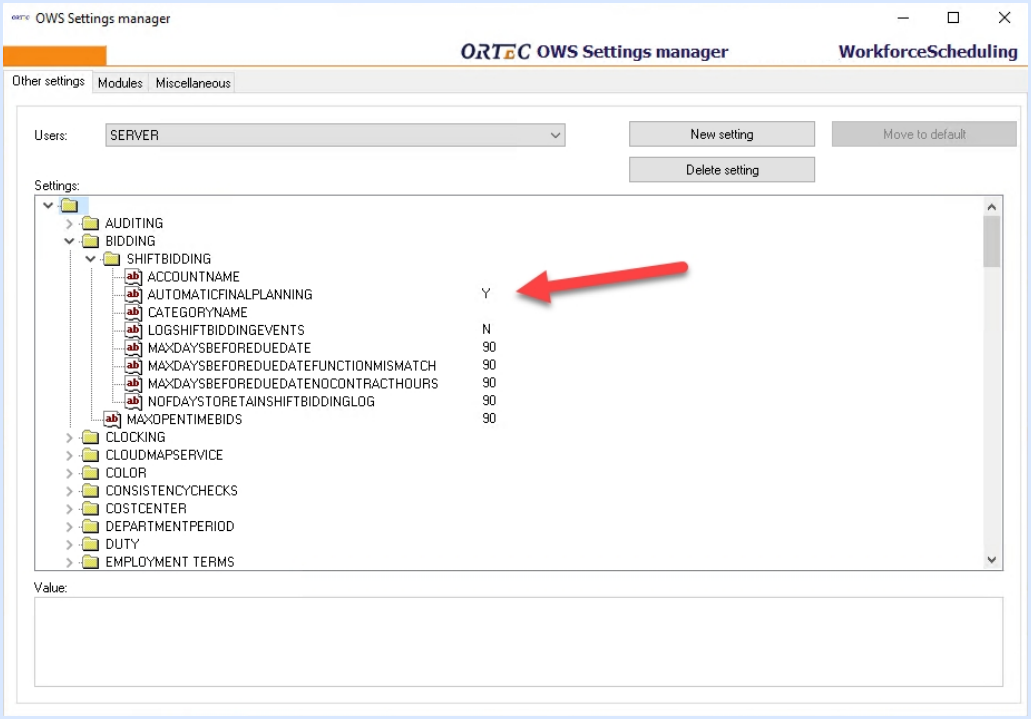
This method allows for more balanced and well-considered scheduling decisions.

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2 Configuration

1. In **OWS Settings Manager**, set the value for AUTOMATICFINALPLANNING to Y.

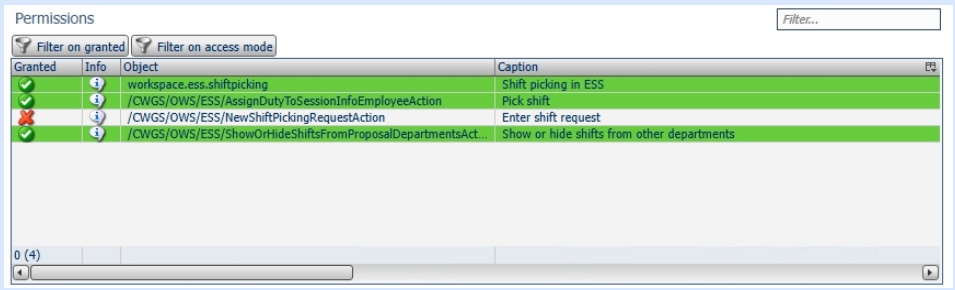
Example



2. In **Access Control**, define the permissions for either Shift Picking or Shift Bidding.

   - For Shift Picking, enable the rights as displayed in the example below. Select **Shift picking in ESS**, **Pick shift**, and **Show or hide shifts from other departments**.

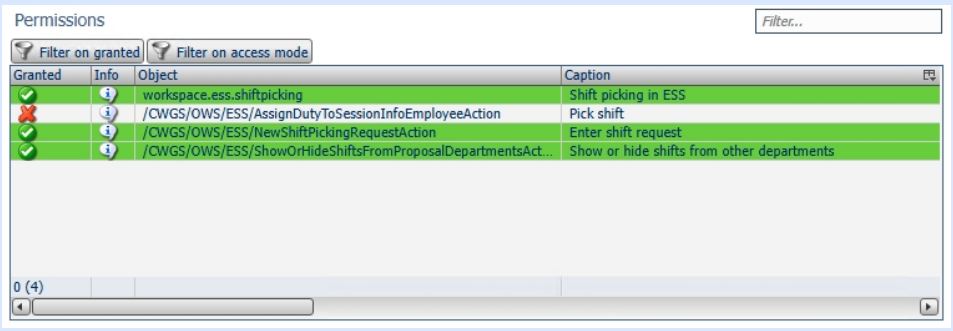
Example



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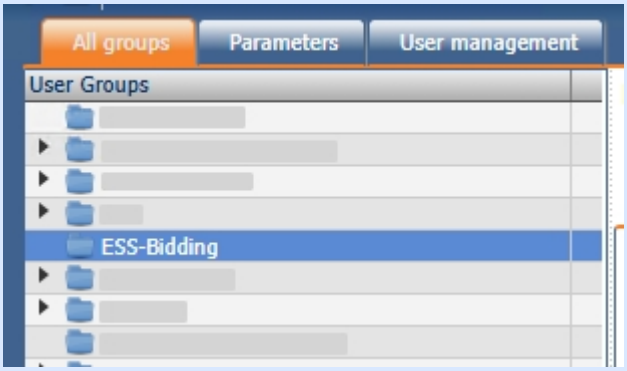
- For Shift Bidding, enable the rights as displayed in the example below. Select **Shift picking in ESS**, **Enter shift request**, and **Show or hide shifts from other departments**.

Example



3. Also in **Access Control**, assign these rights to an ESS group.

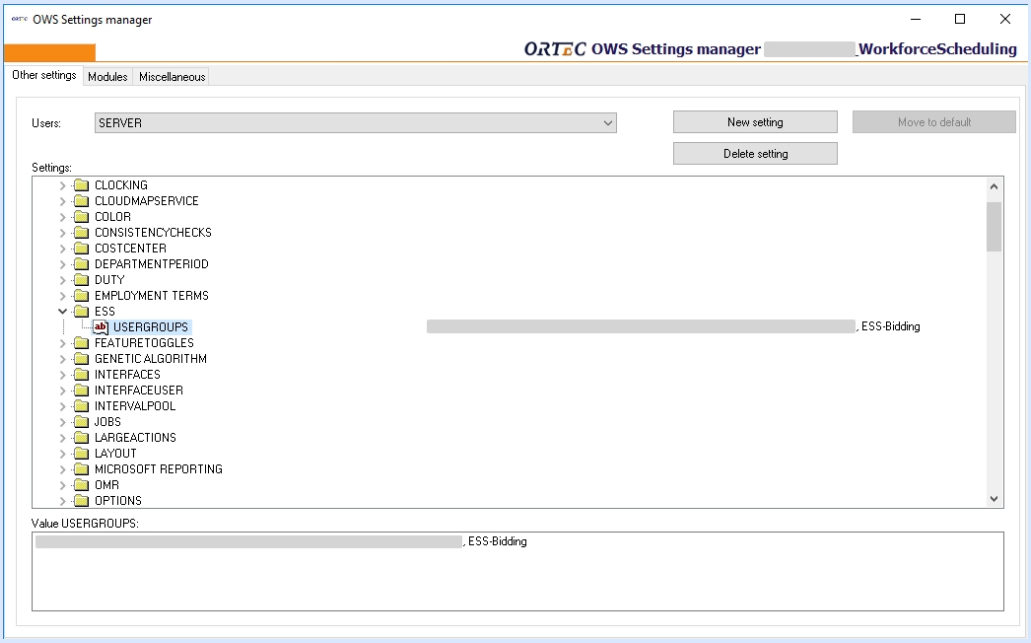
Example



4. (Optional) If you create a new group, don't forget to add it in **OWS Settings Manager** > ESS > USERGROUPS.

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Example



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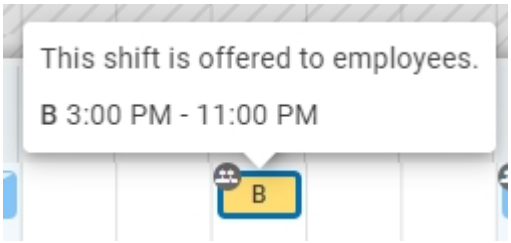
3 Offer shift for picking or bidding

After the settings are configured, let's take a look at how this works.

1. Open a schedule using either **Team Scheduler** or the **OWS Client**. In this example, we will demonstrate the steps in **Team Scheduler**.
2. For a single shift, select - in the **Vacant shifts** section - a shift. In the **Shift details** window, select **Actions** > **Offer shift**. Continue with step 4.
3. For multiple shifts, hold down the **Ctrl** key when drawing a rectangle with the mouse or selecting multiple shifts. In the upper-right corner, click **Actions** > **Offer shift (n)**.
4. To confirm, click **Offer shifts**.
5. Offered shifts are visualized by a distinct icon in the schedule view.

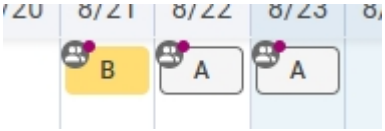


6. The shift details window and the shift hint text also provide information about the offered status.



> When **Shift Picking** is enabled, once an employee selects an offered shift, it is automatically assigned to that employee and the icon is removed from the shift.

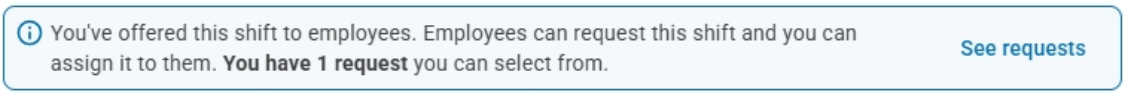
7. With **Shift Bidding** enabled and **Shift Offering** (cloud app) configured for the environment, the planner can see if there are employee requests via a distinct red/purple dot added to the Shift Offering icon.



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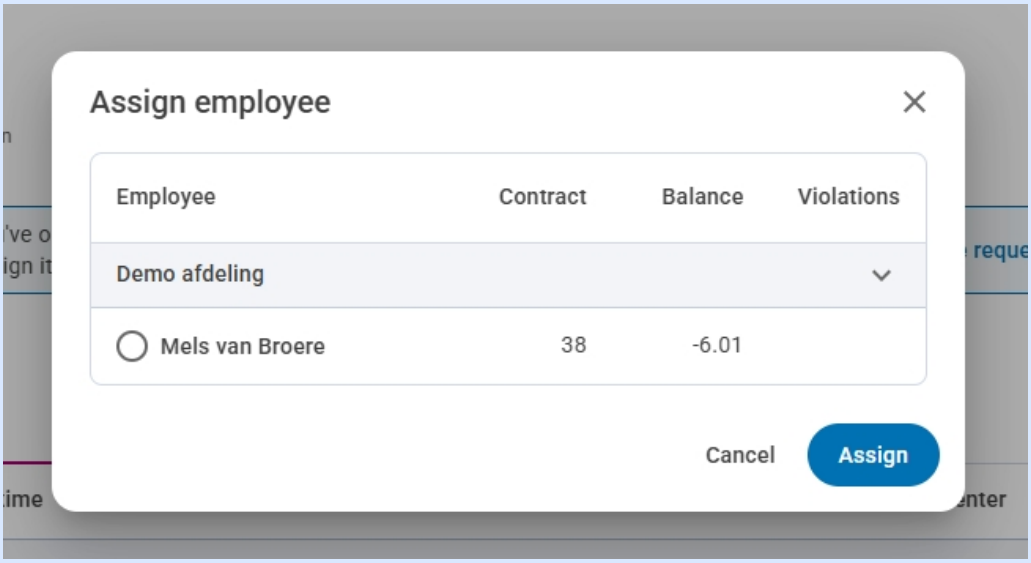
When needed, contact your ORTEC representative for more information.

8. Select a shift to view the **Shift details** window for more information about the number of employee requests.



9. Select **See requests** to open a dialog with more information about the employees that requested the shift. This information includes the employee name, department, contract hours, balance and violations.

Example



10. Assign the shift to one of the employees. This includes assigning employees from proposal departments.

Assigning a shift in this way starts the same post-processing as when a shift is assigned via the Ad Hoc Planner or Shift Offering. This includes updating duty request statuses and triggering notifications. Depending on the configuration, the following actions may occur:

- When a shift is offered for bidding, employees may receive a notification that a shift is available.

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- When an employee is assigned the shift:
  - The employee receives a notification that the shift has been assigned.
  - The corresponding duty request is automatically set to approved.
- When an employee is not selected for the shift:
  - The employee may receive a notification that the request was not accepted.
  - The corresponding duty request is automatically set to rejected.

Note: Notifications depend on system configuration and may not be enabled by default.

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4 Offer shifts to other departments

It is possible to link departments so that shifts can be selected from each other when they are opened for bidding. The restrictions of the ATW rules also apply here, and one must have the correct qualification (if the shift requires a qualification).

1. In the **OWS Client**, go to **Maintenance** > **Organization**.
2. Select a department on the left. For example, department A.
3. Select the **Shift proposal criteria** tab.
4. In the **Proposal from other departments** section, select another department. For example, department B.
5. Select department B on the left. In the same section, select department A. Department A and B are now linked to each other.

Once a shift has been offered for picking or bidding (see "Offer shift for picking or bidding" on page 6), an employee from department A can select a shift from department B, and vice versa.

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5 Withdraw shift for picking or bidding

Withdrawing the offer means the shift is no longer available for picking or bidding in **ESS 7**.

- For a single shift, select - in the **Vacant shifts** section - the offered shift. In the **Shift details** window, select **Actions** > **Withdraw offer**.
- For multiple shifts, hold down the **Ctrl** key when drawing a rectangle with the mouse or selecting multiple shifts. In the upper-right corner, click **Actions** > **Withdraw offer (n)**.

To confirm, click **Withdraw offer**.

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6 Request or pick a shift in ESS 7

1. Users go to their **Schedule**.
2. They select the month for which they want to view the available shifts. If there are available shifts in the selected month, **Looking for more work?** is shown on top of their schedule.
3. They can select **Looking for more work?**
   The **Shifts available** screen provides a list view of the available shifts in the selected month.

> Users can only view shifts for which:
> - There's no overlap with an already scheduled shift.
> - They have the required qualifications.
>
> ***Attention*** : Not all visible shifts can be selected. When you try to select a shift, additional checks are performed, for example, against employment conditions and rest period rules. If selecting the shift would result in a violation, you cannot select it.

4. Depending on whether Shift Picking or Shift Bidding is configured, users have the following option:
   - With Shift Picking configured, users select the **Pick** button.
   - With Shift Bidding configured, users select the **Apply** button.
5. They select **Confirm**.

> - With **Shift Picking** enabled, the shift is immediately added to their schedule and will no longer be presented as an available shift to their colleagues.
> - With **Shift Bidding** enabled, they will get a notification when the shift has been assigned to them. Users receive notifications depending on configuration (see "Offer shift for picking or bidding" on page 6).
>
> In both cases, to remove the shift from their schedule, they need to request a swap with a colleague or contact their manager or planner.

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Contact information

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