ORTEC Workforce Scheduling 7

User Manual Team Scheduler

August 2026 - Public

ORTEC

Copyright

Table of Contents

1 Introduction

ORTEC WS for Team Schedulers is a web-based application that helps team schedulers create and modify schedules up until they are formally closed for approval by a manager. It connects securely to **ORTEC Workforce Scheduling**, also referred to as the back-end system, to perform its functions.

2 Sign in

To use the application, you must sign in to your account:

1. Open the URL in a supported browser.
2. (Optional) Choose a language. The default language is English (United States).

   > It's possible to change the language after signing in. See "User account" on page 4.

3. Click **SIGN IN**.
4. Depending on the configuration of the system, either enter your username and password or sign in with your organizational account.

> If you need assistance signing in, contact your system administrator.

3 Dashboard

After signing in, you'll start in the dashboard. The dashboard provides an overview of information that's important to you as a scheduler, and highlights areas that need immediate attention, for example, staffing shortages.

Depending on your permissions, some dashboard tiles may not be visible.

3.1 Select department

Use the **Departments** dropdown list in the upper-left corner of the dashboard to select the departments you want to see information for. You'll only see departments you're authorized to access.

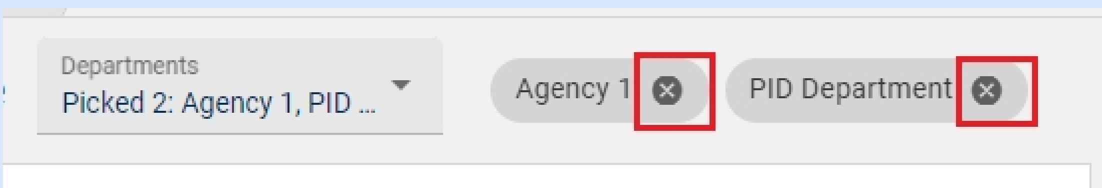
Permissions to access a department are granted by the system administrator.

- By default, the first department in the list is always selected.
- If you select multiple departments, the data displayed on the dashboard is grouped per department.
- Use the **Departments** checkbox in the dropdown list to select all departments or to clear all your selections.

Names of the selected departments are displayed next to the **Departments** list. You can remove the displayed data of a selected department by clicking X or by clearing your selection in the list.

Example

After selecting one or more departments, you can deselect them again by clicking the cross icon.



3.1.1 User account

Once signed in, you can access your account in the upper-right corner of the application screen.

It provides the following options:

- **Language**: The default language in **Team Scheduler App** is English (United States). If you choose a different language from the dropdown list, the change is applied immediately and saved for future logins. Language changes affect time and date formats.
- **Dark theme**: Use the toggle button to turn on or turn off the dark theme. The change is applied immediately and saved for future logins.
- **SIGN OUT**: To sign out of the application.

3.2 What's on the dashboard

The information on the dashboard is further divided into various tiles as explained in the following sections.

> When you have 4 or more departments selected, the **Today** and **Weekly staffing** tiles do not load automatically. Instead, the user can request the information manually by selecting either **SHOW ME TODAY** or **SHOW ME WEEKLY STAFFING**. This helps to improve performance.

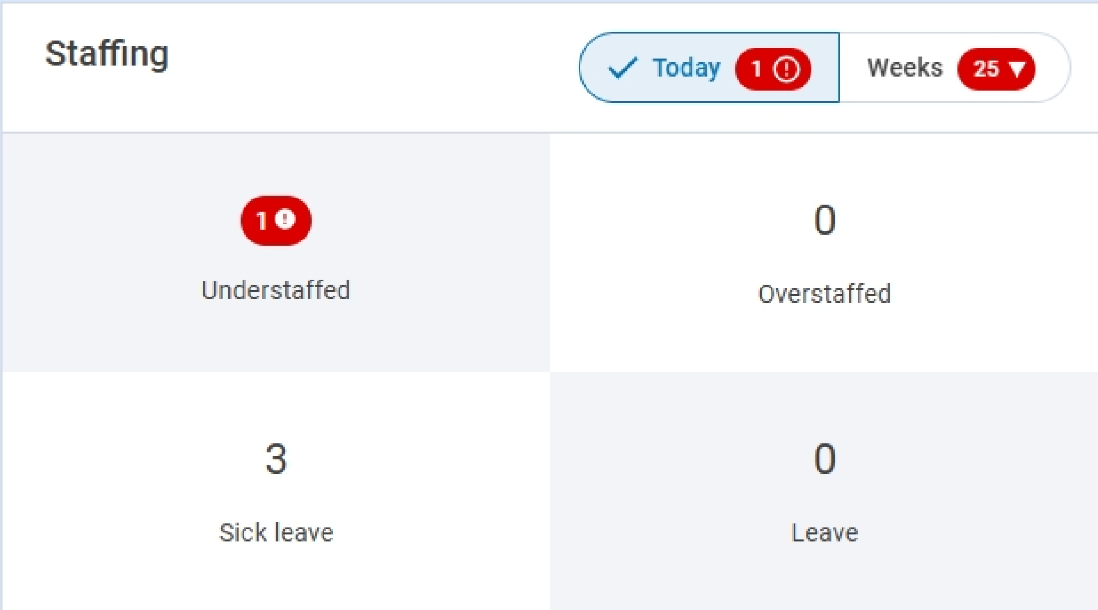
3.3 Staffing

The **Today** section displays the data of the current day:

- **Understaffed**: The total number of shortages in the day. Hovering over the number will reveal the shifts that have a shortage and the exact shortage for each shift. Clicking the number will open the schedule for the current period.
- **Overstaffed**: The total number of surplus shifts planned in the day.
- **Sick leave**: The total number of employees who are on sick leave on the day.
- **On leave**: The total number of employees who have an approved leave on the day.

Example

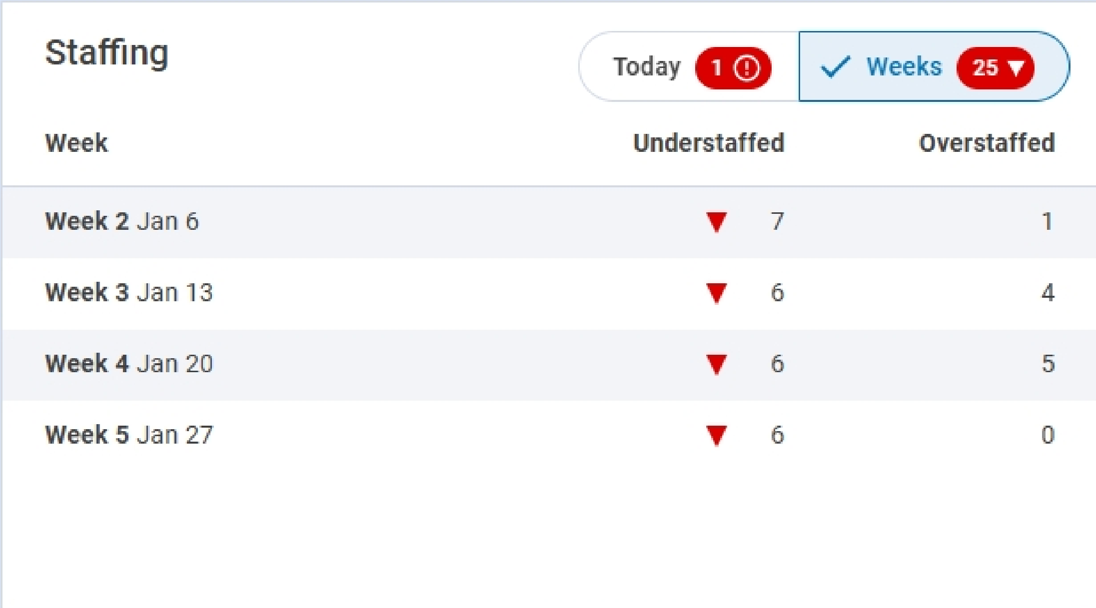
The screenshot below shows information of one department. If you have chosen multiple departments, the information will be presented in a tabular form, with each department in a separate line.



The **Weekly** section displays an overview of the staffing situation in a tabular form.

- After the current week, the table continues with the upcoming three weeks of the calendar.
- Each week is displayed with the week number followed by the date of that week. It also displays the understaffed and overstaffed data of each week.

Example



3.3.1 Navigating to the planboard

In the **Today** section, hover over the number of understaffed shifts and click to open the planboard. In the **Weekly** section, select a week to open the schedule. It will open on the first day of the month.

3.4 Sick leave

This tile shows a list of employees who are currently or in the near future on sick leave. Select the **History** tab for an overview of past sick leaves. Both tabs contain the following information:

- **Employee**: The name of the employee who reported sick.

  If you have selected more than one department, the department to which the employee is assigned is also displayed. If the employee is assigned to multiple departments, only those selected in the **Departments** dropdown list are shown.

- **Shifts (7d)**: The number of shifts assigned to the employee from the start date of the sick leave until 7 days in the future. These shifts might require action by replacing them with sick leave shifts.

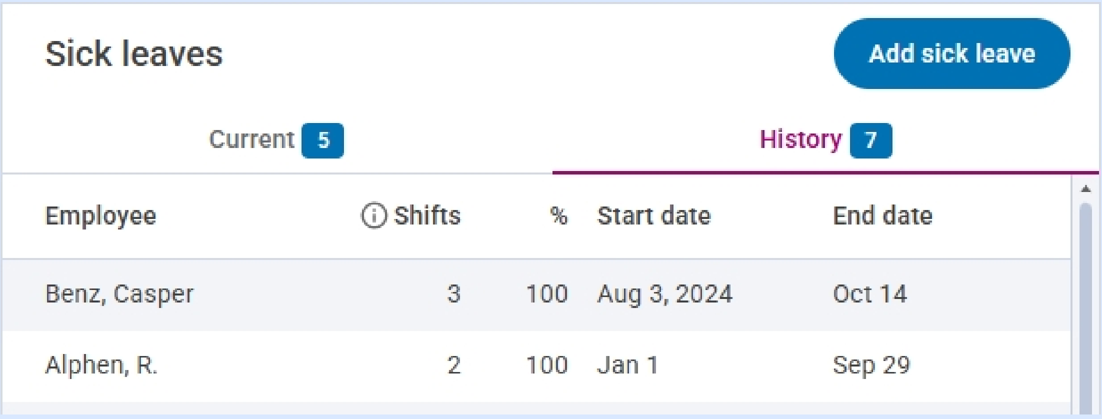
  Note that it only counts the shifts that meet the following criteria:

- The shift consists of only labor activities.
- The shift doesn't contain any illness activities.

- **%**: The percentage of absence of an employee.
- **Start date**: The date when the employee reported sick.
- **End date**: The date when the employee reported better.

Example

If an employee reported sick for 40%, he can work at 60% capacity.



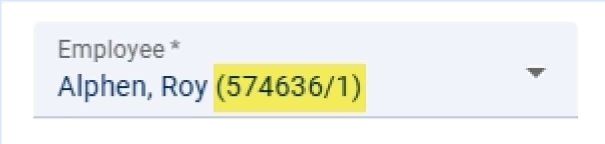
Add, edit, and/or delete sick leaves is only available with the necessary permission.

3.4.1 Add sick leaves

1. Select, in the upper-right corner of the **Sick leave** tile, the **Add sick leave** button.
2. In the **Add sick leave** window, define the following:
   - **Employee**

     Select an employee within the currently selected departments.

   - **Sick leave type**
   - Deselect the checkbox **This sick leave applies to all contracts of the employee** if sick leave should apply only to the specified contract for this employee. This allows the employee to continue working on other contracts if their condition permits.

> Example
>
> The employee contract number appears next to the employee's name.
>
> 
>

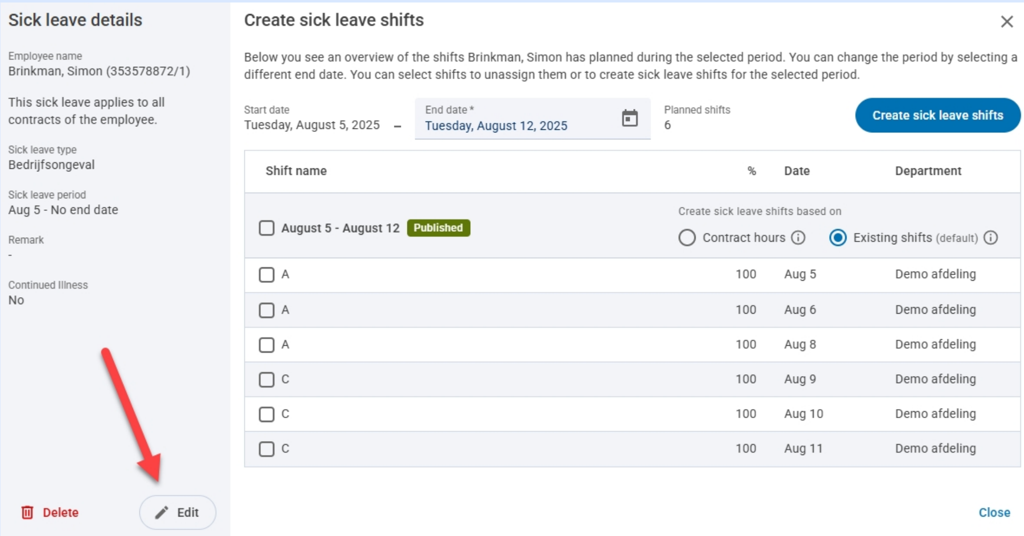
- The **Start date** is automatically set to today.
- (Optional) **Start time**
  Set the start time only if the sick leave begins after midnight, which is the beginning of the day. For example, when the sick leave starts at 08:30 (and not 00:00), define it here.
- (Optional) When an end date is already known, select the checkbox **I want to specify an end date**.
- (Optional) **End time**
- (Optional) When available, manage the properties.
- (Optional) **Remark**

3. Click **Save**.
4. In the **Sick leave details** window, you can replace already assigned shifts with sick leave shifts.

3.4.2 Edit sick leaves

1. In the **Sick leaves** tile, select an employee with sick leave.
2. In the **Sick leave details** section, select **Edit**.

Example



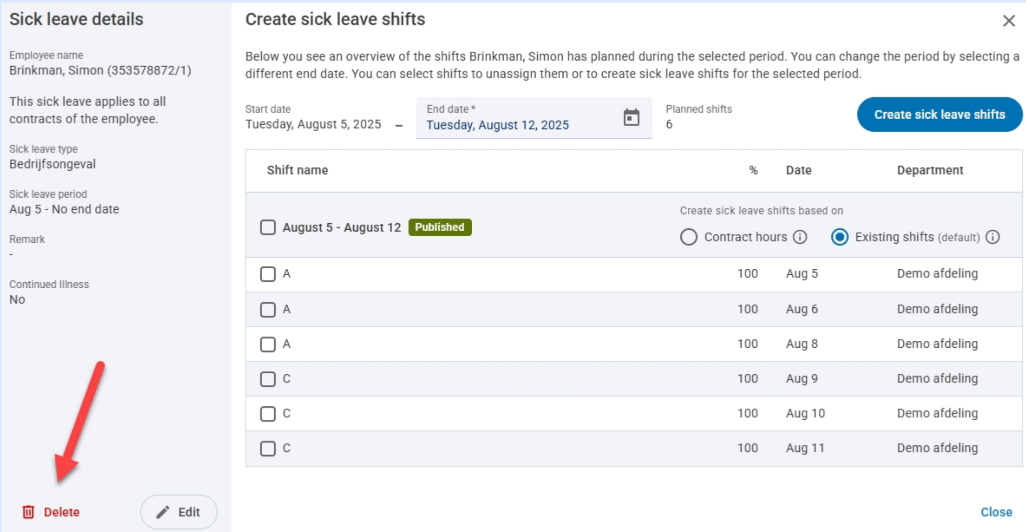
3. In the **Edit sick leave** window, you can adjust the **End date**, **End time**, and add a **Remark**.
4. (Optional) When available, edit the properties.
5. Click **Save**.

3.4.3 Delete sick leaves

1. In the **Sick leaves** tile, select an employee with sick leave.
2. In the **Sick leave details** section, select **Delete**.

Example

Deleting a sick leave is only possible for sick leaves that don’t have sick leave shifts with status Closed.



3. Confirm by clicking **Delete** again. This will automatically roll back all sick leave shifts that were created in the sick leave period.

3.4.4 Create sick leave shifts

This method doesn't consider the percentage of absence. Complete shifts are replaced with sick leave shifts. Different scenarios are possible. For example:

- An employee works 50% of each shift; replace part a shift as explained here: "Replace part of a shift with sick leave" on page 12.
- An employee is 20% sick and works the whole week except on Monday; replace the complete shift on Monday with a sick leave shift.
- An employee is 80% sick; first replace all shifts with sick leave shifts, then - in the schedule - edit the shifts that are worked partly.

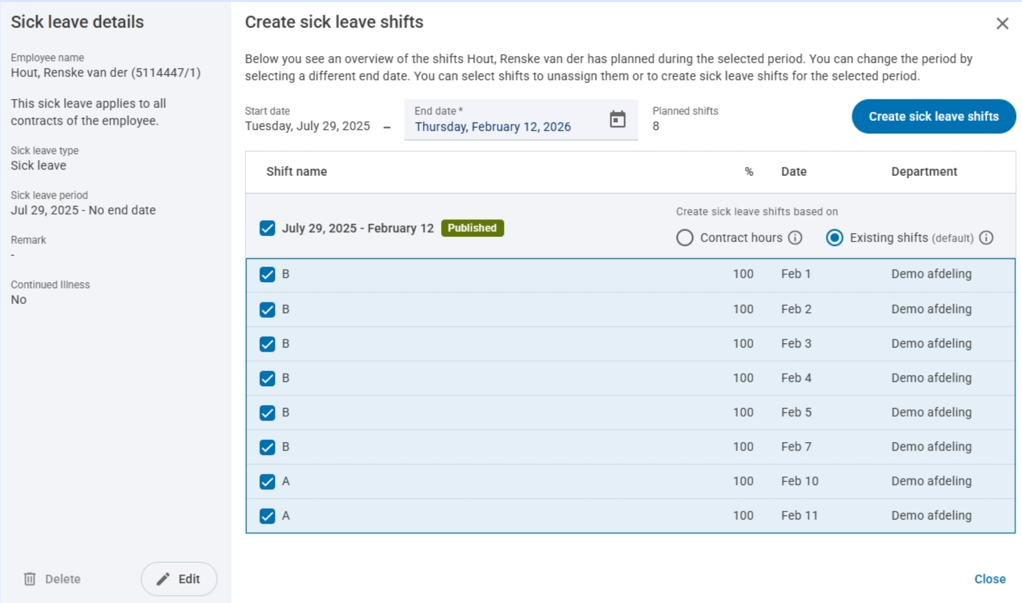
If the employee is 100% sick and has shifts planned, the planner can replace the assigned shifts with sick leave shifts. When thus replaced, the previously assigned shifts are unassigned. This will be reflected in the schedule, for example, in the **Vacant shifts** section in the schedule and **Understaffed** on the dashboard.

To create sick leave shifts:

1. In the **Sick leave** tile, select the employee. This will open a window with detailed information.

Example

Overview of shifts that need to be replaced for a specific employee.



2. Specify the date range in which you want to create sick leave shifts. All the assigned shifts in the selected date range are listed.

   By default, all non-closed shifts from the start of the sick leave until 7 days in the future are shown.

   If the sick leave starts during a shift, the first shift will be marked with a clock icon to indicate that only part of that shift will be replaced.

3. You can overrule the default replacement option by selecting the other one:

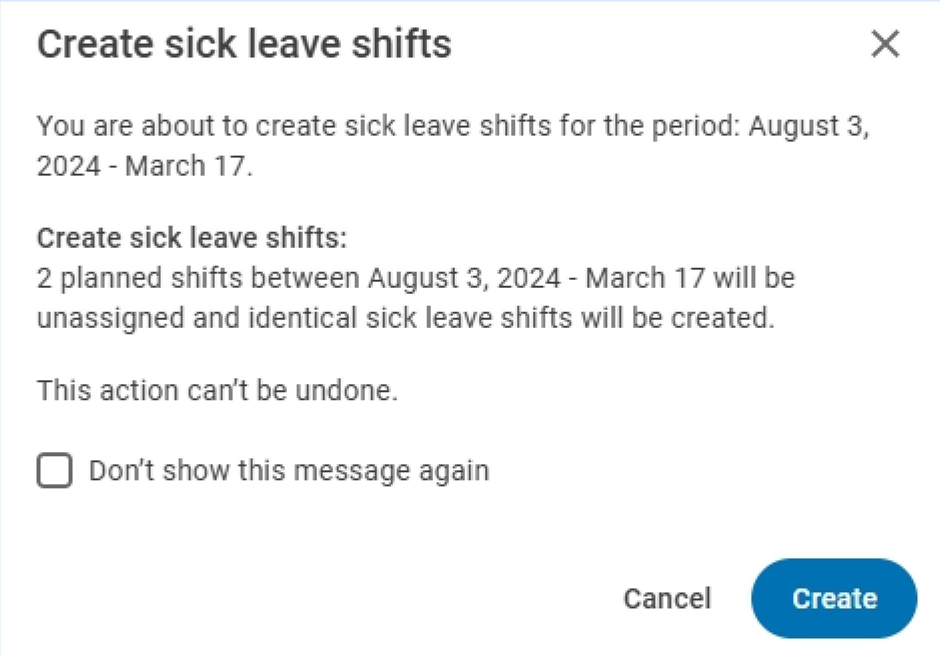
- Based on existing shifts in the schedule. The by default selected shifts will be unassigned and sick leave shifts will be created that match the original shift's times and duration.

- Based on contract hours. Any shift assigned to the employee within the selected period will be unassigned and contract based sick leave shifts will be created for the employee up until the date selected in step 2.

4. Click **Create sick leave shift**.

5. When a confirmation message is displayed, click **Create** to replace the shifts or **Cancel** to go back to the previous window.

Example



6. If you chose **Create**, the assigned shifts will be replaced with sick leave shifts and/or the contract hours will be shown as sick leave shifts.

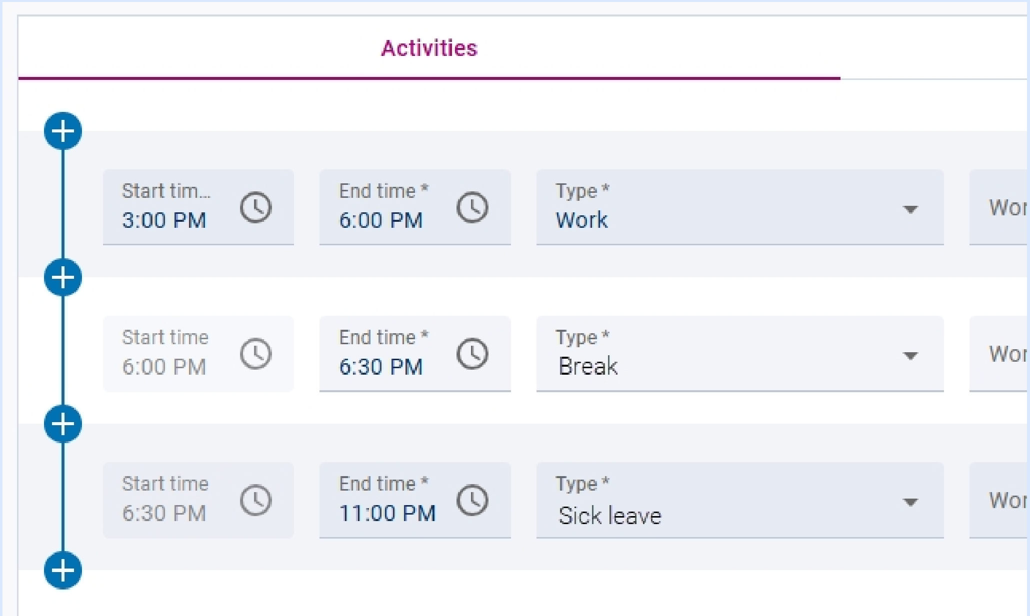
   You can open the corresponding schedule to verify the change. The previously assigned shifts now should appear in the Vacant shifts section.

3.4.5 Replace part of a shift with sick leave

Use this method to replace part of a shift with sick leave. For example, an employee works each shift for 50%.

1. In the schedule, select the shift that needs to be adjusted.
2. Select **Edit** in the bottom-right corner.
3. In the **Activities** tab, adjust a part of the shift with sick leave via the **Type** field.

Example



4. Click **Save**.

A shift with a sick leave part isn't counted as a sick leave shift on the **Sick leave** tile.

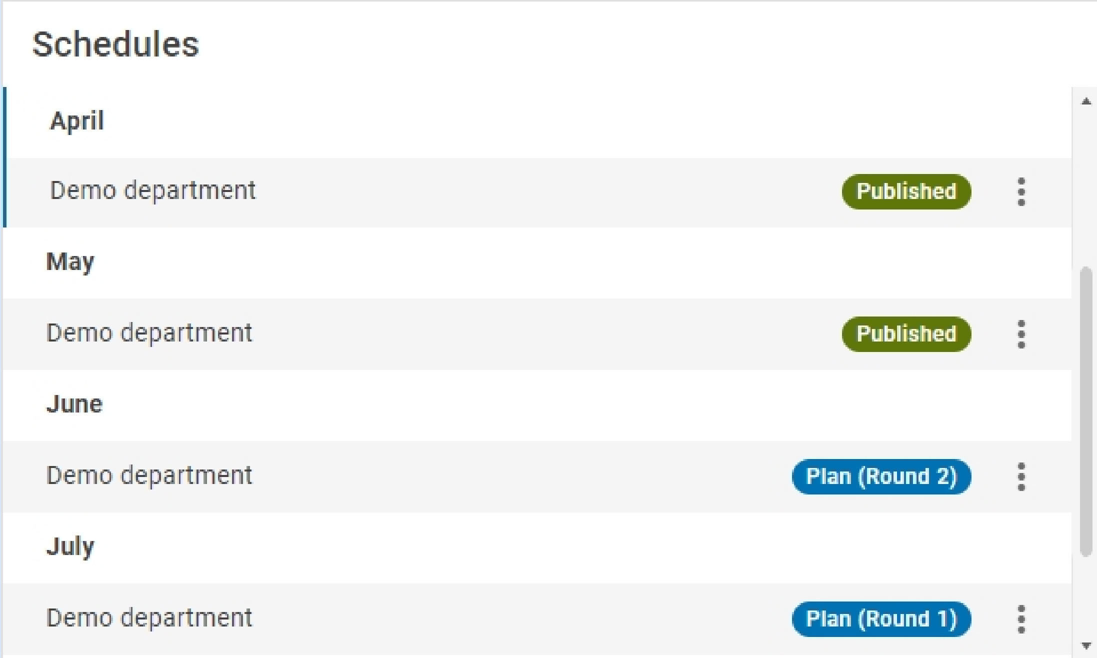
3.5 Schedules

This tile displays the schedules and their statuses in a tabular form. By default the tile lists the following schedules:

- The schedule prior to the current one
- The current schedule
- The upcoming three schedules

Example

Schedules and their statuses in a tabular form. The current schedule is highlighted by a blue vertical line.



When a schedule is being optimized, a pair of cyclical arrows are displayed next to it.

When a schedule has multiple statuses, they're all displayed in the tile. This is only the case when set like that in the OWS client. The OWS Team Schedulers app doesn't currently allow for multiple statuses during a scheduling period.

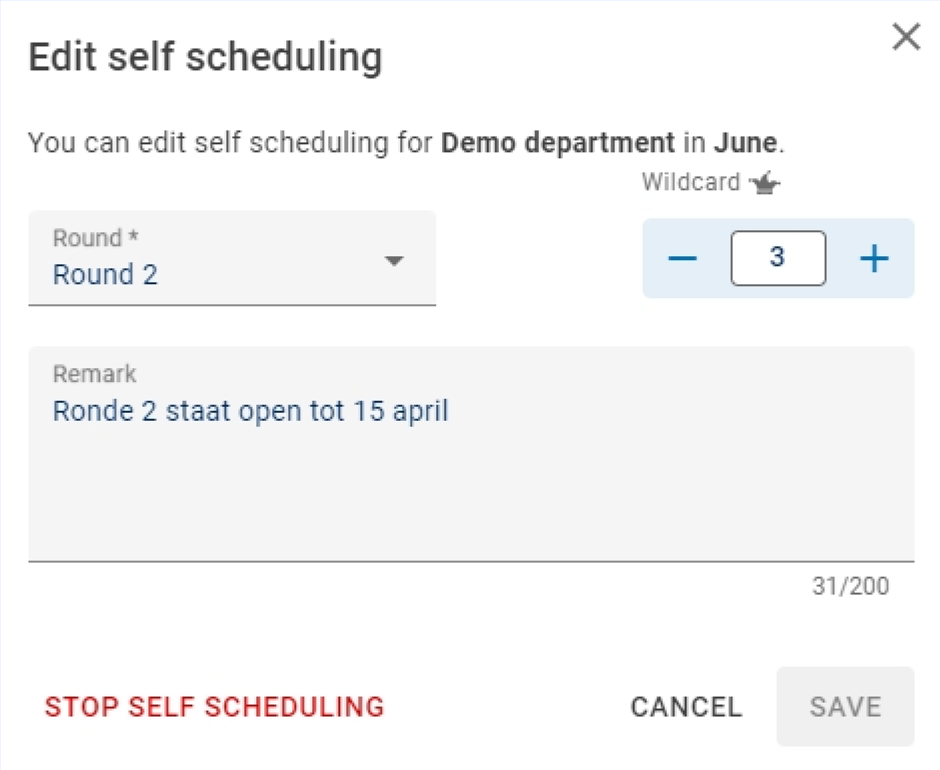
You can click a schedule to open it in the "Planboard" on page 23.

3.5.1 Start and edit self scheduling

With "Self scheduling" on page 82 enabled, schedulers can start and edit self scheduling directly in the **Schedules** tile.

1. Click on the three dots next to the schedule to start or edit self scheduling.
2. Select **Start self scheduling** or **Edit self scheduling**.
3. Define the **Round** number, the number of **Wildcards**, and the **Remark** shown to ESS users.

Example



4. Click **SAVE**.
5. Alternatively, click **STOP SELF SCHEDULING** to disable self scheduling.

3.6 Employee realizations

After an employee realization or confirmation has been made in ESS, you can approve or decline them in the **Employee realizations** tile.

3.6.1 Manage employee realizations

1. Select an open employee realization.

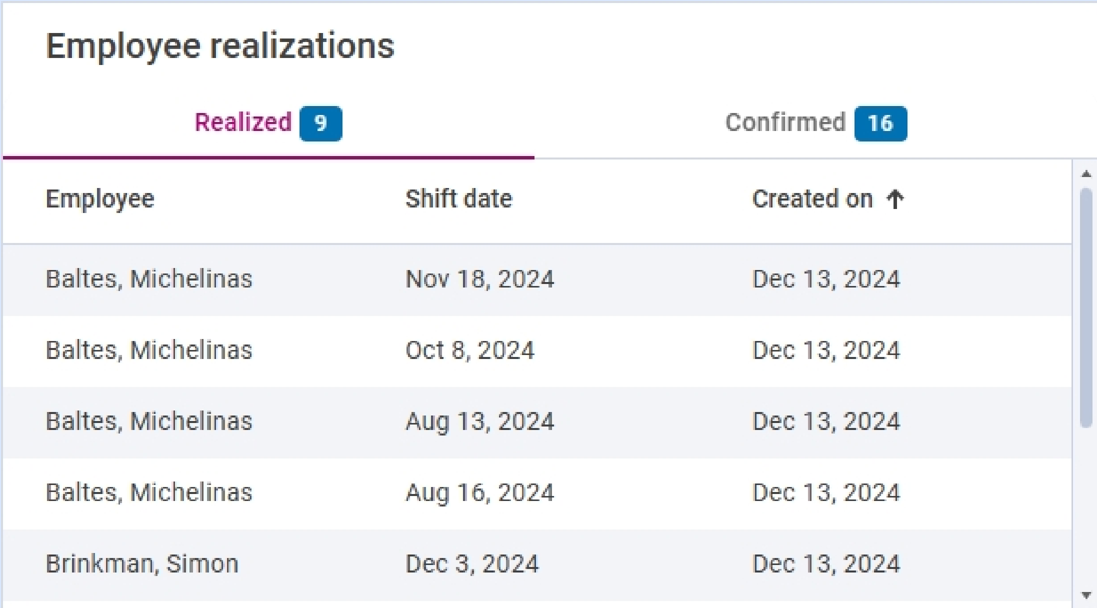
2. Compare the planned shift on the left with the realized shift on the right.

   - To approve, click the green **Approve** button.

   - To decline, first add a remark explaining the reason. Next, click the red **Decline** button.

Example

The total number of open employee realizations are shown in the header.



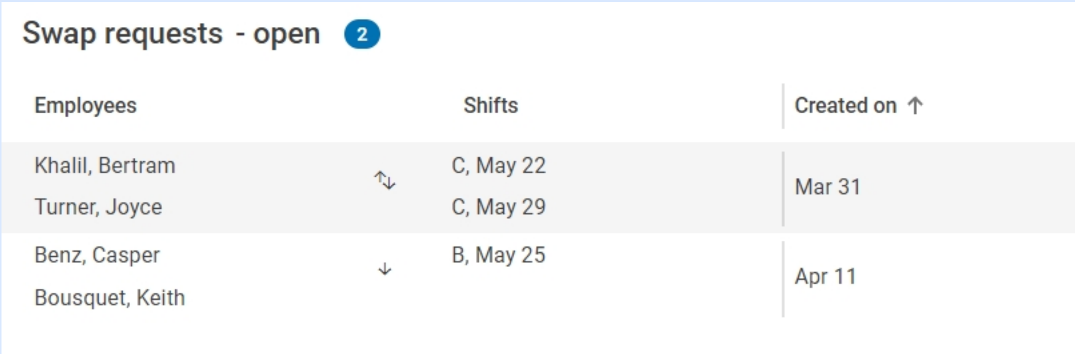
3.7 Swap requests

The **Swap requests** tile shows all the swap requests with the status **Open** made by employees via ORTEC WS for Employees (ESS), including requests for a period in the past and those with several months ahead in the future.

When using **Team Schedulers** for the first time, you may see a long list of old requests that are still open. You can choose to handle these requests yourself, or you can contact ORTEC to have them cleaned up.

Example

Swap requests.



The tile shows the following information:

- **Employees**: The names of the two employees who agreed on the swap.

  The type of the swap request is indicated by an arrow icon:

  - up down arrow ⇅: A swap of 2 shifts.

    This type of request is created when an employee selected a shift (e.g. shift A), chose a swap option for a shift back (e.g., shift B), and then sent a request to the colleague involved.

  - down arrow ↓: A give-away swap.

    This type of request is created when an employee asked a colleague to take his or her shift, without receiving back a shift.

- **Shifts**: The dates and names of the involved shifts.

- **Created on**: The dates when the recipient employees accepted the swap requests (the swap requests were ***completed***).

Once a schedule is published, an employee can request a swap with a colleague using ESS. The recipient employee can accept or decline the swap request in ESS. When both employees have agreed on a swap (a second employee has approved the swap request of the first employee), the swap request is regarded as ***completed***. Depending on the system configuration, a completed swap request is either automatically processed or to be approved by the planner, see "Need for approval" on page 18.

3.7.1 Sort swap requests

By default, swap requests are displayed in the chronological order based on their creation time, which means, the oldest request always appears on the top of the list.

You can click the column headers to change the sorting order or sorting criteria. For example, clicking **Shifts** sorts the requests by the date of the first involved shift.

3.7.2 Need for approval

Whether the planner needs to approve swap requests is configured on the department level.

Open and processed requests

A planner serving multiple departments could see two tabs, namely **Open** and **Processed**, in the Swap requests tile if one of the following conditions is met:

- Departments with different need approval settings are selected.
- For one or more departments, the approval setting has been changed from need approval to no need for approval, while there are still open requests before the change to no need for approval.

For swap requests that need approval, all the pending requests are shown on the **Open** tab, even if the involved shifts are in the past.

For swap requests that are automatically processed, they are shown on the **Processed** tab only if one of the involved shifts is in the future.

Multiple requests for the same shift

An employee can send multiple swap requests for the same shift to different colleagues. If more than one colleague accepted the request:

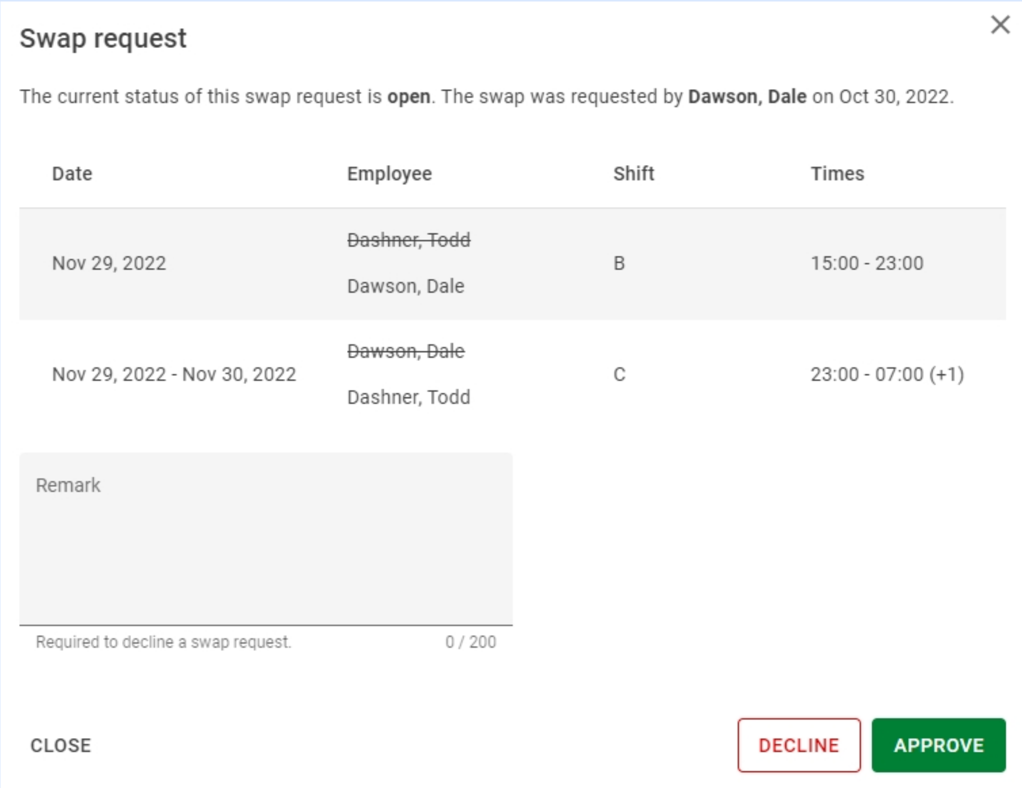
- for requests that need approval, the planner decides which one to process in the schedule
- for requests that need no approval, the first employee who accepted the request is processed in the schedule

3.7.3 Approve or decline swap requests

To process an open swap request that needs planner approval:

1. Select the swap request to see the detailed information.(The original owner of the shift is indicated by a strike-through in the employee name)

Example



2. Approve or decline the request.

   - If you choose to approve the request, the back-end system of ORTEC WS will check whether the shifts can be swapped. You will get an error message if there are other constraints that do not allow the swap, for example, if the swap would cause a violation in the schedule.

   - If you choose to decline the request, you have to enter a remark, which will be visible to the employee. A remark is not required for approval.

   - If you are not ready to proceed with the request yet, select **CLOSE** or **X** in the upper-right corner to close the dialog.

Once the request is approved or declined, it will disappear from the **Swap requests** tile.

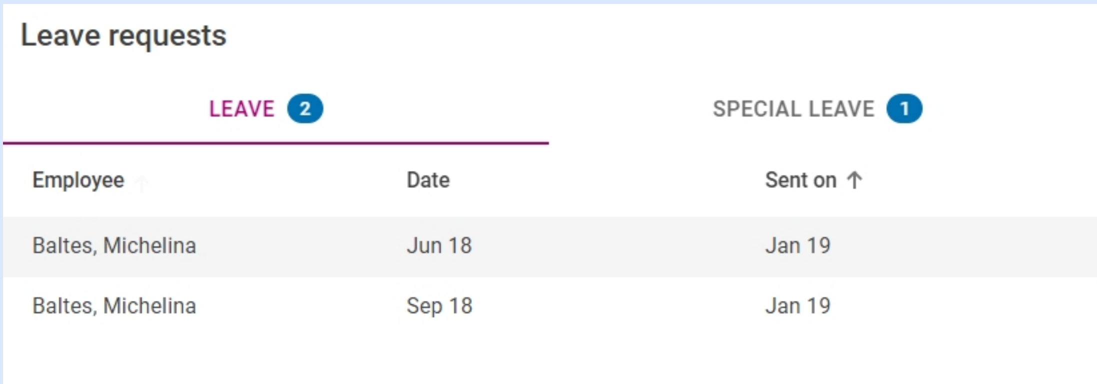
3.8 Leave requests

The **Leave requests** tile shows all the leave requests with the status **Open** in the selected departments. The planner can check the leave requests and approve or reject them.

> When using **Team Schedulers** for the first time, you may see a long list of old requests that are still open. You can choose to handle these requests yourself, or you can contact ORTEC to have them cleaned up.

There are two types of leave requests: **LEAVE** and **SPECIAL LEAVE**, shown on the respective tabs.

> Example
>
> Though not shown in the example below, leave requests are also possible for a part of the day.



The tile shows the following details on each of the tabs:

- **Employee**: Name of the employee. If you have selected more than one department, the department to which the employee is assigned is also displayed. If the employee is assigned to multiple departments, only those selected in the **Departments** dropdown list are shown.
- **Date**: The requested period of leave.
- **Sent on**: The date when the leave request was sent by the employee.

> - Leave requests are usually created by employees using ORTEC Workforce Scheduling for Employees. When creating a leave request via ORTEC WS client, make sure to fill in the ***leave type*** in the **Specifications**. Otherwise, the leave request will not appear on the tile.

3.8.1 Sort leave requests

By default, leave requests are displayed in the chronological order based on when they were sent, which means, the oldest request always appears on the top of the list.

You can click the column headers to change the sorting order or sorting criteria. For example, clicking **Date** sorts the requests by the start date of the requested leave period.

3.8.2 Process leave requests

To process a leave request:

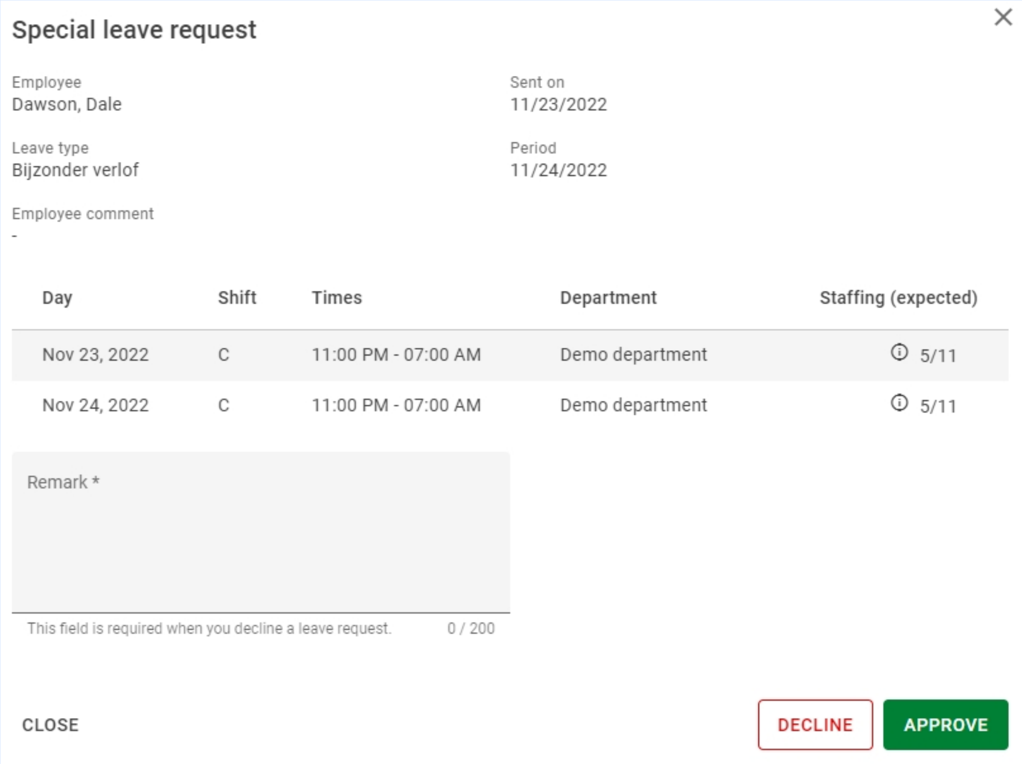
1. Select the leave request to show the detailed information.

2. Check whether the employee has any assigned shifts during the requested leave period, or whether there is any comment from the employee.

   If there are no assigned shifts, you'll see a statement saying something similar to "*Employee has no shifts assigned ...*".

   In the example below, the employee has assigned shifts during the requested leave period. If approved, there will be a shortage of employees for that shift, as indicated in Staffing (expected). In such a case, you might want to evaluate the staffing situation before approving the leave request.

Example



3. Approve or decline the request.

   - To approve, select **APPROVE**. Depending on the settings in OWS, leave shifts might be planned in. This is based on the leave request processing settings, which can be different depending on the status of the schedule.

   - To decline, enter a remark, which will be visible to the employee. Then, select **DECLINE**.

     A remark is not required for approval.

   - If you're not ready to proceed with the request yet, select **CLOSE** or **X** in the top-right corner to close the dialog.

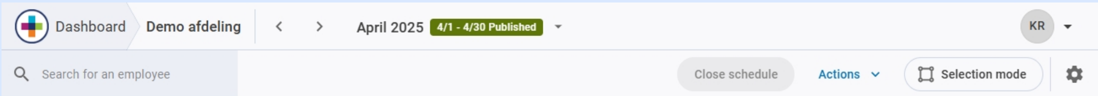
Once the request is approved or declined, it will disappear from the **Leave requests** tile.

4 Planboard

The Planboard displays a specific period of the selected department. You can carry out various planning activities here.

4.1 Header

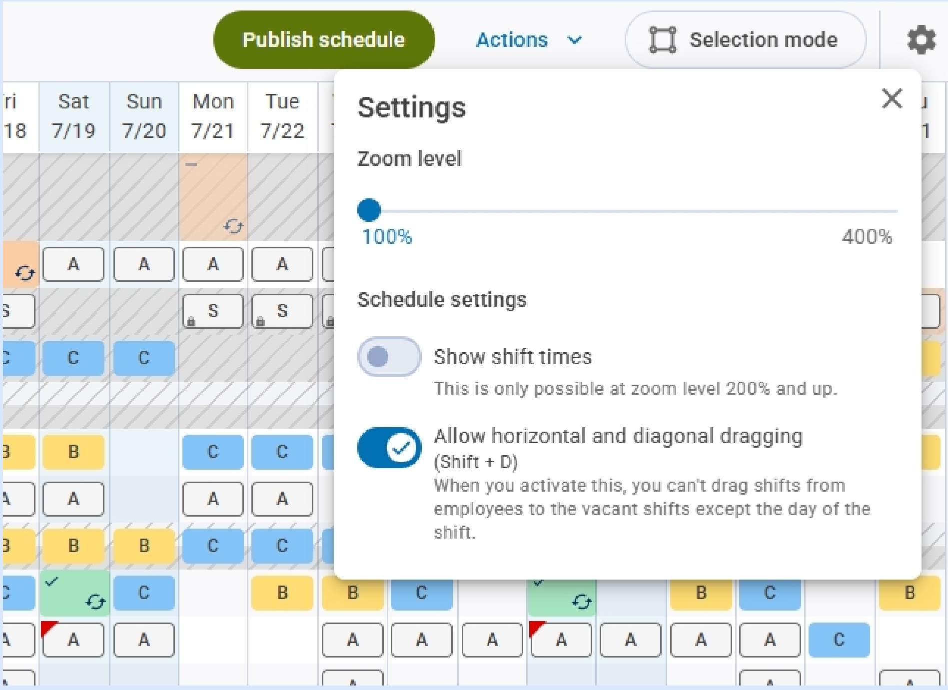
Example



The header at the top displays the selected period and its status. In the header you can also:

1. Use the arrows to navigate between schedules and a dropdown to jump directly to any available schedule.
2. On the left, click the logo to open the "Dashboard" on page 3.
3. Below the logo, search & filter employees by name. Typing a search phrase will automatically filter the schedule on employees whose names match the search phrase.
4. On the right, view or adjust the "User account" on page 25.
5. Below the user account, click Settings to adjust the **Zoom level**, toggle **Show shift times**, and **Allow horizontal and diagonal dragging**.
   - **Zoom level**
     View long shift names by adjusting the width of the shift cells.
     By default the **Zoom level** is set at 100%. Drag it to the right to widen the shift cells.

Example



- **Show shift times**
  Turn shift times on or off with the toggle button. When enabled, the employee number appears in the schedule's employee section.

> The **Zoom level** will be adjusted automatically to make the shift times visible.
> With **Language** set to **English (United States)** via "User account" on page 25, please note that the **Zoom level** needs to be set at 300% to view the entire shift time.

- **Allow horizontal and diagonal dragging**
  While activating the possibility to horizontally and diagonally drag and drop shifts within the schedule, it will not be possible to move a vacant shift to another day, or to unassign a shift to another day.

6. Click the **Selection mode** button to select shifts.
   This is used to "Fix and unfix shifts" on page 47 and "Subcontracting shifts" on page 50.
7. Via the **Actions** menu you can:
   - Click "Optimize schedule" on page 72 to automatically assign shifts.
     This option is available with the optimizer module available and in scheduling status **Plan**.
   - Click "Apply cyclical schedule and shift demands" on page 74 to roll out a base schedule with a recurring pattern.
     This option is available in scheduling status **Plan** and **Published**.

8. "Change status of a scheduling period" on page 76 if applicable, for example, click the **Publish schedule** or **Close schedule** button.

4.1.1 User account

Once signed in, you can access your account in the upper-right corner of the application screen.

It provides the following options:

- **Language**: The default language in **Team Scheduler App** is English (United States). If you choose a different language from the dropdown list, the change is applied immediately and saved for future logins. Language changes affect time and date formats.
- **Dark theme**: Use the toggle button to turn on or turn off the dark theme. The change is applied immediately and saved for future logins.
- **Sign out**: To sign out of the application.

4.2 Employees

In the **Employees** panel, the employees belonging to the selected department are listed alphabetically (to list the employees in reverse alphabetical order, click the column header **Employees**).

- The weekly contract hours of each employee is displayed under the column **Contr. hours**.
- The application can display up to eight columns of calculated values for each employee.

Example

Next to the contract hours, this example displays the period balance, the yearly balance, the leave balance of each employee in hours, and the earned self scheduling points. The **Self-S Points** column is visible only during an active scheduling round in the current scheduling period if it's configured to be displayed.

Employees ↑	Contr. hours	+/-P	+/-Y	Leave	Self-S Points
Alphen, Roy	40.0	-31:16	-332.37	295	9.29
Baltes, Michelinas	33.6	31:37	27.57	255	9.60
Beerepoot, Gemaa	10.0	-17:11	-85.52	80	10.00
Beijersbergen, Jacob	40.0	-08:46	-187.57	305	9.00
Benz, Casper	20.0	-79:22	-15.03	153	0.00
Bousquet, K.	36.0	-15:24	-165.60	281	8.59

4.2.1 View employee details

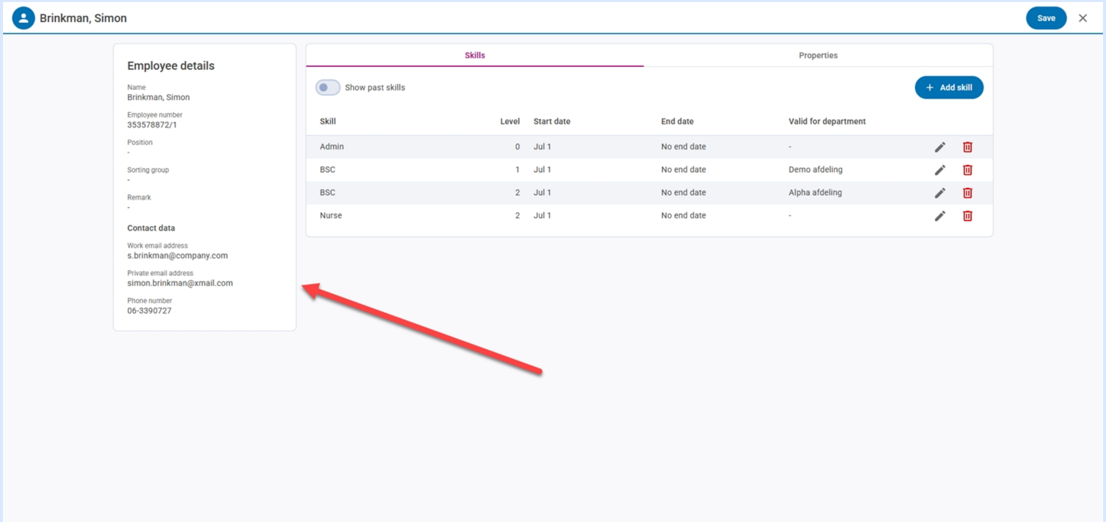
Only users with schedule editing permissions can access the employee details dialog, but editing information is not possible while viewing employee details.

Clicking the name of an employee will show the employee's detailed information, including:

- **Name**: full name of the employee. Any prefixes such as Mr. or Mrs. are added at the end of an employee name. Initials are shown when an employee doesn't have a registered first name.
- **Employee number**
- **Position**: the function that is active on the first day of the selected schedule
- **Sorting group**: all sorting groups that are active on the first day of the selected schedule

- **Remark**: additional information defined on the employee level
- **Contact data**:
  - Work email, private email
  - Phone number: up to three phone numbers as defined in the ORTEC WS client

Example



4.2.2 Manage employee skills

Only users with the correct permission in **Access Control** can manage employee skills.

Clicking the name of an employee will show the employee information. Make sure the **Skills** tab is selected to do the following:

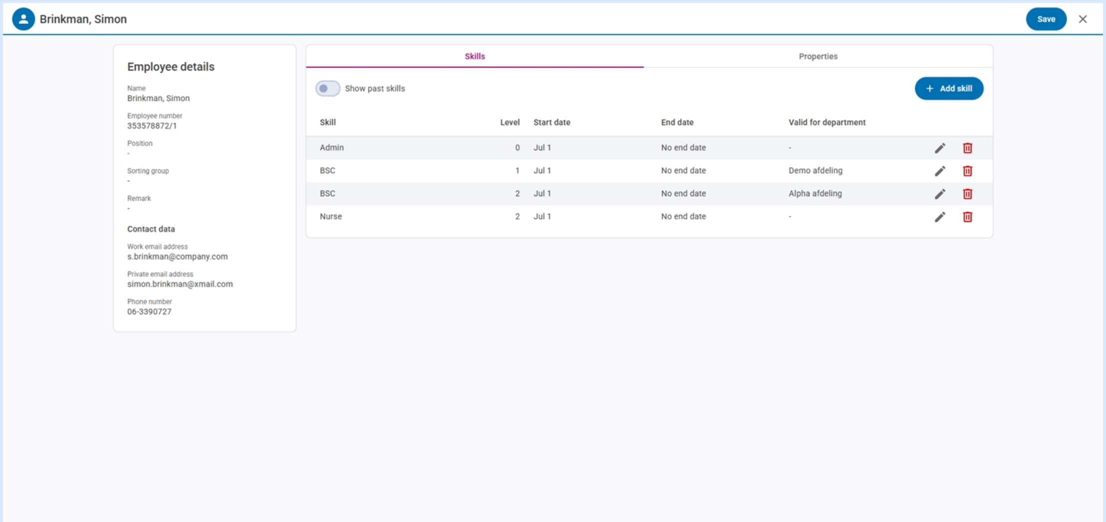
- **Show past skills**: select the toggle button to display skills that are not longer active.
- **Edit skill**: select the **Edit** icon in a skill row to edit the level, start and end date. You can view but not change whether a skill is for a specific department.
- **Delete skill**: select the **Delete** icon in a skill row to delete the skill. Confirm.
- **+ Add skill**: select the blue **+ Add skill** button to add a skill. Select a skill, a level, and a start date. Only when adding a new skill, can you define whether it is for a specific department. The toggle value (enabled/disabled) is stored in the user settings, meaning the next time a skill is added the toggle is set to the same value as it was the previous time. Click **Add**.
  - If the toggle is disabled, the skill is automatically valid for all departments (depending on where the skill is defined in the organization).

- If the toggle is enabled, only departments are selectable for which the user has permissions, and to which the employee is assigned to (any point in time).

> - Only skills valid for the assigned department(s) are visible/selectable.
> - In case there are skills with identical names defined across the organization, the name of the organizational level is displayed behind the skill name.

When you're done, click **Save** in the top-right corner.

Example



4.2.3 Manage employee properties

> Only users with the correct permission in **Access Control** can manage employee properties.

Clicking the name of an employee will show the employee information. Make sure the **Properties** tab is selected to do the following:

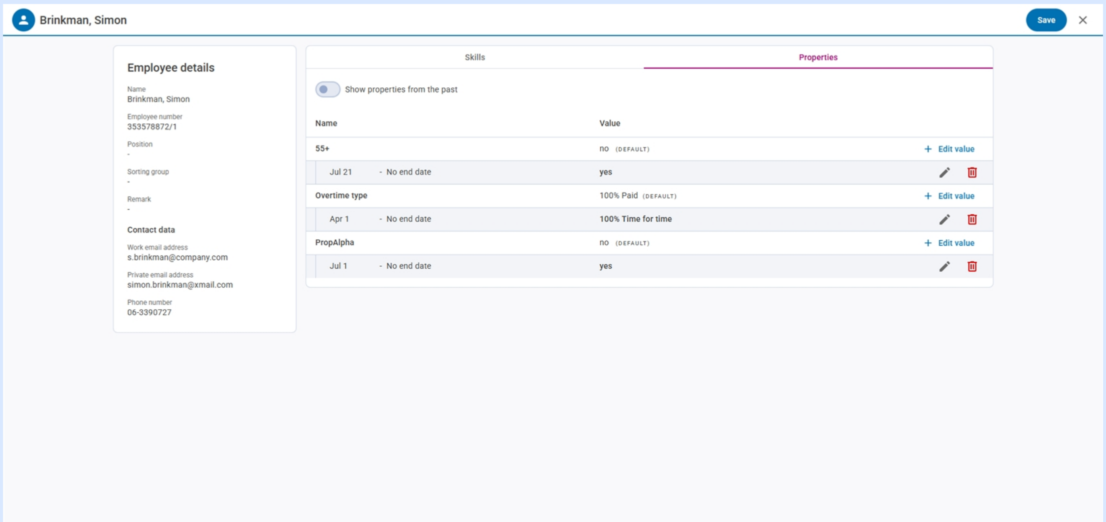
- **Show properties from the past**: select the slide button to display properties that are not longer active.
- **+ Edit value**: change the value for an employee property for a specific time frame. You can't change the value to the default value. If you want to do that, simply delete the edited value or set an end date. Click **Save**.

- (Custom) **Edit property**: select the **Edit** icon in a property row to edit the value, start and end date. Click **Save**.
- (Custom) **Delete property**: select the **Delete** icon in a property row to delete the property value. Confirm.

> - Which property types are visible is managed by a setting in **ORTEC System Configuration** called TeamScheduling\Employees\Properties. This is introduced to prevent all properties being visible by default, which is often undesired because some could contain sensitive information.
>   **Note**: Only properties of type Yes/No and Text (with predefined values) are supported.
> - The visible property types also depend on the assigned department (s) of the employee (in any point in time). Only properties valid for the assigned department(s) are visible/selectable.
> - In contrast to the ORTEC WS Client, the default value of a property is always visible on employee level.

When you're done, click **Save** in the top-right corner.

Example



4.2.4 Sort and group employees

To better visualize a schedule, you can sort and group employees .

Sort employees

You can sort employees alphabetically by their last names or by any of the calculated values.

To sort employees alphabetically, click **Employees** or follow the steps below:

1. Right-click **Employees**.
2. Select **Sort ascending** or **Sort descending**. The employees will be sorted accordingly.

> The complete string, starting with the last name, is used. Any prefix will come at the end of the last name and will not be a determining factor in the sorting.

To sort employees by any of the calculated value, click on the desired column heading or follow the steps below:

1. Right-click the column heading.
2. Select **Sort ascending** or **Sort descending**. The employees will be sorted accordingly.

The arrow in the display indicates which column is used for sorting; the direction of the arrow indicates whether it's in ascending or descending order.

Group employees

Employees can also be grouped based on sort categories assigned to them in the back-end system. Values valid on the first day of the scheduling period are used.

To group the employees:

1. Right-click **Employees** or any other column heading.

2. Select **Grouping**.

3. Choose from **Employee conditions**, **Main department**, **Position**, **Rotation unit**, or **Sorting group**.

After grouping the employees, you can expand or collapse the group by clicking the group name.

- If you sort employees when they're grouped, they'll be sorted within their groups.
- If an employee is assigned to more than one sort category in the back-end system, the employee will be shown in any one of the groups.

Sort groups

Once the employees are grouped by their sort category, the groups can also be sorted alphabetically in ascending or descending order.

1. Right-click **Employees**.

2. Select **Group ascending** or **Group descending**. The groups will be sorted accordingly.

Sorting of the groups doesn't influence the sorting of employees. For example, the groups can be sorted alphabetically while the employees in the groups are sorted reverse-alphabetically.

4.2.5 Select columns to display

The **Employees** section displays the column of the contract hours and up to five calculated columns by default.

There are two ways to hide one or more columns:

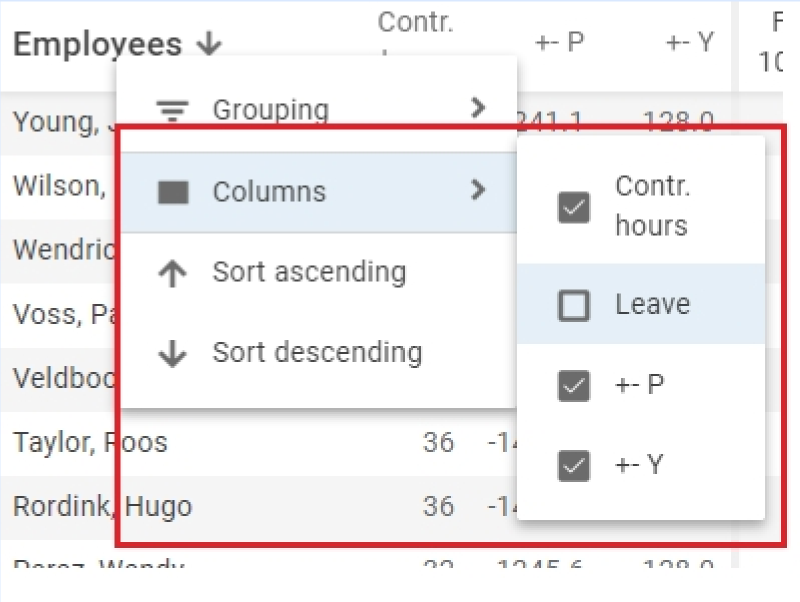
- Right-click a column heading and select **Hide column** to remove it from the screen.

- Or, follow the steps below:
  1. Right-click anywhere in the **Employees** header.
  2. Click **Columns**.
  3. Clear the checkbox of the column(s) you want to hide.

To bring back a hidden column:

1. Right-click anywhere in the **Employees** header.
2. Click **Columns**.
3. Select the checkbox of the column(s) you want to display.

Example

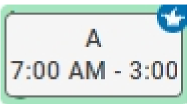


4.3 Schedule

This section displays the assigned shifts for each day in the period for every employee in the department. Each block on the schedule represents a shift. Additional information, including preferences to work or not, absences, and violations, is also displayed.

Visual indicators

- Shifts between midnight and 06:00 are considered night shifts, and are displayed in blue.
- Shifts between 06:00 and 18:00 are considered day shifts, and displayed without color.
- Shifts between 18:00 and midnight are considered evening shifts, and are displayed in yellow.
- Shifts that have more than half their duration in any of these intervals are given the same color as that interval. For example, a shift from 15:30 to 21:30 is considered an evening shift and displayed in yellow.
- Shift (duty) wishes to work are displayed in green, shift wishes not to work are displayed in orange. It doesn't matter if the wishes are incidental or recurring.
- Wildcards are visible as shift wishes with a blue icon. This makes wildcards easily recognizable by planners.

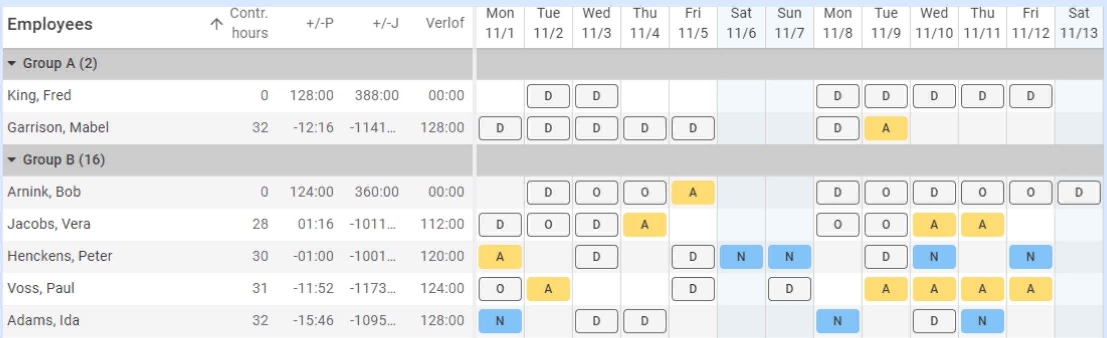


- Sick leaves are displayed in pink.
- Leave requests are displayed in gray-blue.
- An icon indicates sick leaves, leave requests and department unavailabilities.

Hovering over a shift will show the starting and ending times and violation text if present.

Example

(Violation) colors can be adjusted in ORTEC WS.



Employees	Contr. hours	+/-P	+/-J	Verlof	Mon 11/1	Tue 11/2	Wed 11/3	Thu 11/4	Fri 11/5	Sat 11/6	Sun 11/7	Mon 11/8	Tue 11/9	Wed 11/10	Thu 11/11	Fri 11/12	Sat 11/13
Group A (2)																	
King, Fred	0	128:00	388:00	00:00		D	D					D	D	D	D	D	
Garrison, Mabel	32	-12:16	-1141...	128:00	D	D	D	D	D			D	A				
Group B (16)																	
Arnink, Bob	0	124:00	360:00	00:00		D	O	O	A			D	O	D	O	O	D
Jacobs, Vera	28	01:16	-1011...	112:00	D	O	D	A				O	O	A	A		
Henckens, Peter	30	-01:00	-1001...	120:00	A		D		D	N	N		D	N		N	
Voss, Paul	31	-11:52	-1173...	124:00	O	A			D		D		A	A	A	A	
Adams, Ida	32	-15:46	-1095...	128:00	N		D	D				N		D	N		

4.3.1 View employee preferences

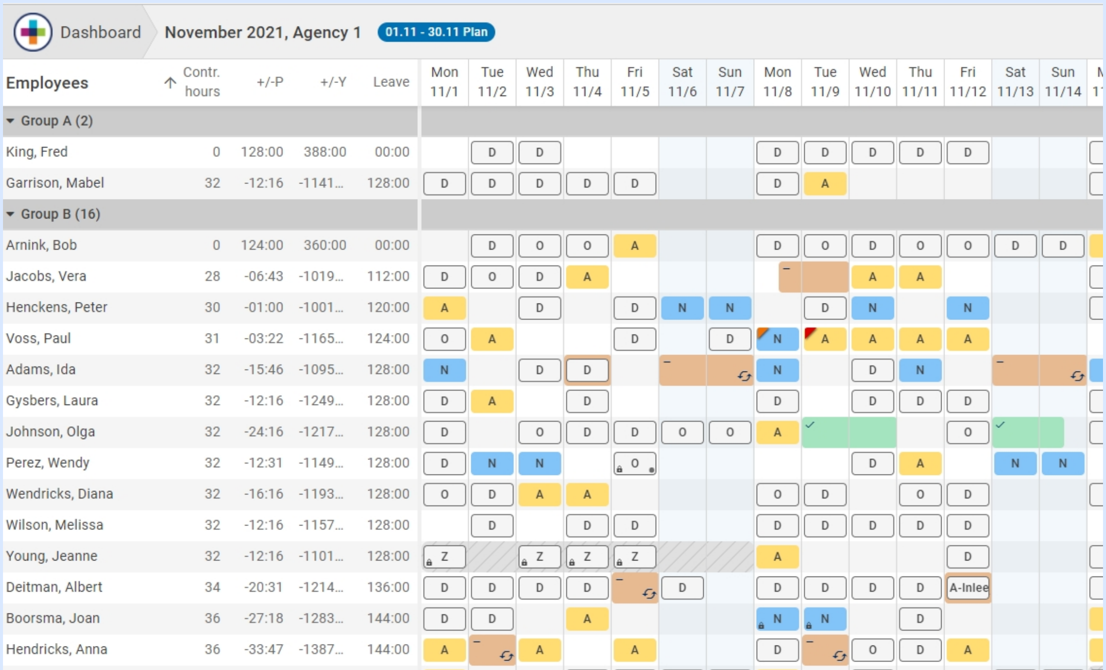
When employees have preferences either to work or not to work on specific days in the specified time intervals, a colored block is displayed in the schedule. Hovering over a colored block will show the details of the preference. A remark of an employee request is shown in the hint text of the request.

Preferences are specified as time intervals. Employee preferences can be one-time requests or periodically recurring requests. Recurring requests are indicated by a pair of cyclic arrows displayed in the lower-right corner of the colored block.

These visual hints can help you consider employees' preferences when assigning shifts.

Example

- Vera Jacobs prefers not to work in the second half of November 08 and the whole of November 09.
- Olga Johnson prefers to work on November 09 and 10, however doesn't have any shifts assigned.
- Albert Deitman prefers not to work on November 12, but has a shift assigned.
- Anna Hendricks has a recurring preference not to work on Tuesdays.



If a preference falls in one half of a day, that is, between 00:00 and 13:00 or between 13:01 and 00:00 (of next day), only half of the block is colored.

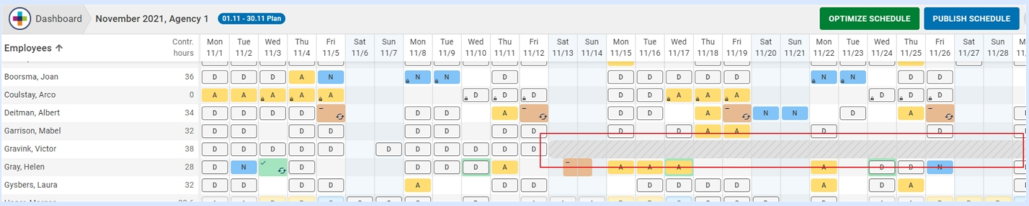
4.3.2 View absences

Absences in the schedule are displayed as gray blocks, with different visualizations for different types of absences. Hovering over the block will display a hint text.

- Sickness is shown as gray blocks with diagonal lines.

  Example

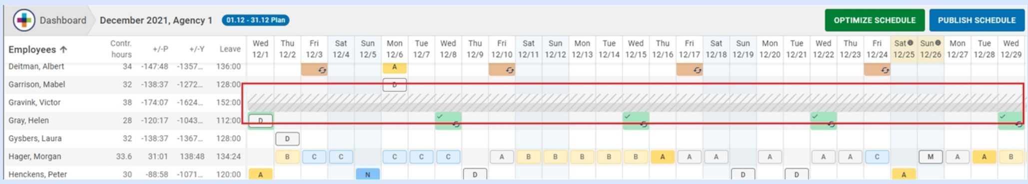
  Victor Gravink has reported sick from November 13 and hasn't recovered yet.

- Employees who have partially recovered from sickness are indicated by half-filled gray blocks with diagonal lines.

  Example

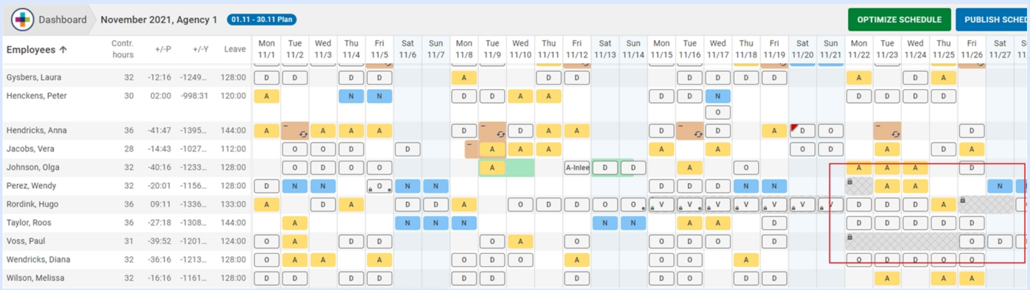
  In December, Victor Gravink has partially recovered.

- Leave requests are shown as gray blocks with diagonal checkers.

> **Example**
>
> Hugo Rordink has requested for leave from November 15 to November 21.
>
> 
>

- Approved leave requests are shown with a lock symbol in the upper-left corner of the first block.

> **Example**
>
> Wendy Perez, Hugo Rordink, and Paul Voss have their leave requests approved.
>
> 
>

> It's possible to assign shifts to an absent employee. These could be shifts indicating absence or even regular work shifts as per the planner's discretion. The application doesn't show a violation, the fact that the employee is absent is indicated by the background shading.

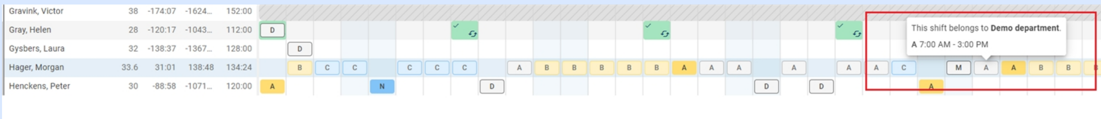
4.3.3 View shifts from other departments

Employees working for more than one department can have shifts from a department other than the currently selected one. These shifts are indicated by a lighter shade. Hovering over such a shift will display a hint text indicating the department to which the shift belongs and the shift timings.

It's not allowed to edit or delete shifts from another department.

Example

Morgan Hager has shift A assigned from another department called Demo.

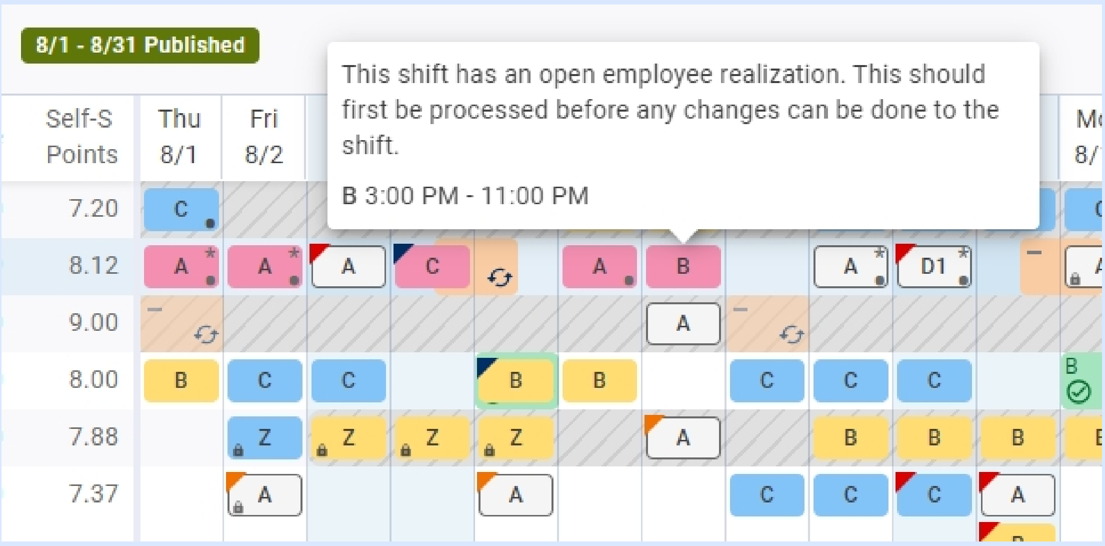


4.3.4 Manage open realizations

Employee realizations made in ESS are visualized in pink to clarify why some actions may be restricted.

Open employee realizations, including those with the status concept approved, are shown in pink within their original department, where approval is required. In other cases, the visualization remains unchanged, but a popover text and shift details callout indicate the employee realization and its approval status.

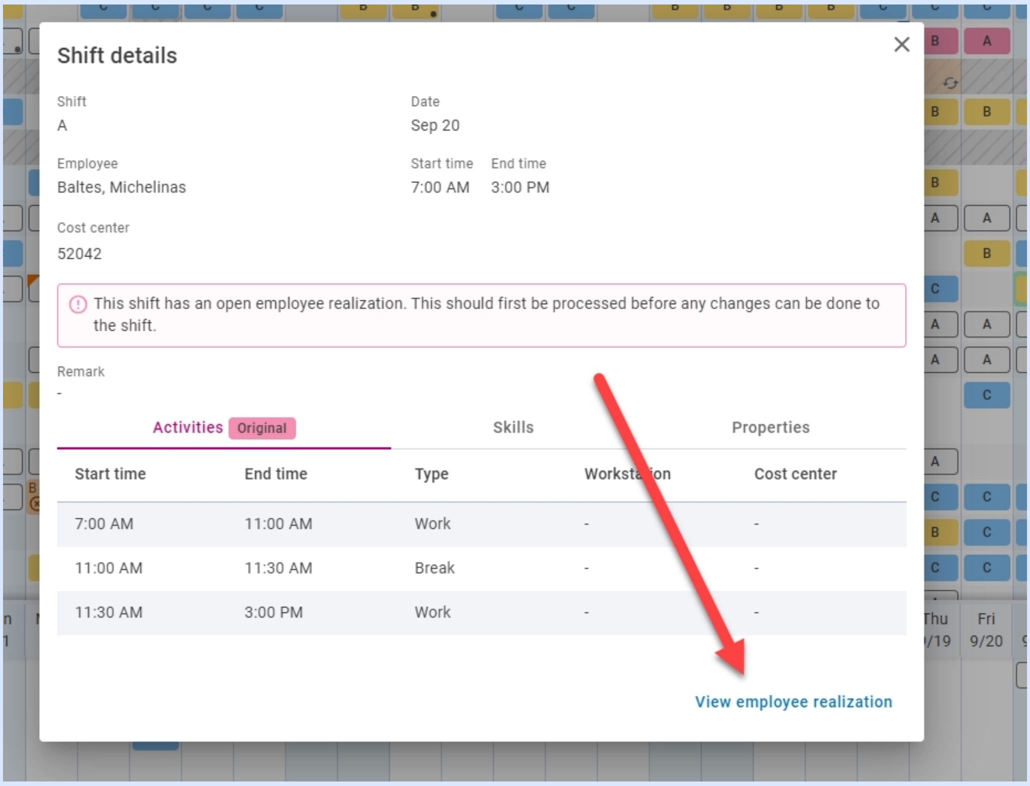
Example



Approve or decline employee realizations

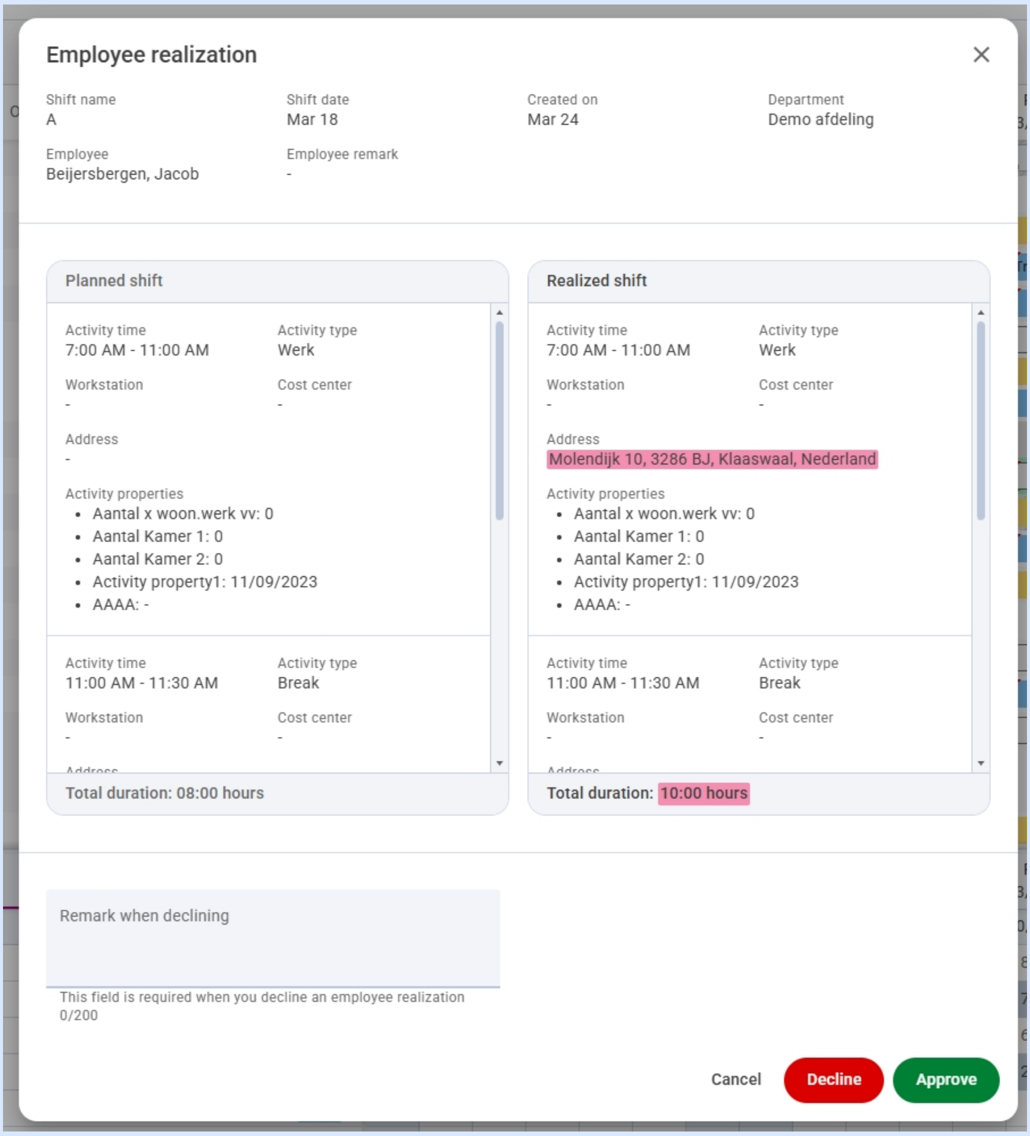
1. Select an open employee realization.
2. In the **Shift details** dialog, select **View employee realization**.

> **Example**
>
> The activities **Workstation** and **Cost center** are only visible when activated in **ORTES WS**.



3. Compare the planned shift on the left with the realized shift on the right.

> **Example**
>
> In the Employee realization shift details you can view the Activity time, Activity type, Workstation, Cost center, Address, and Activity properties.



4. To approve, click the green **Approve** button.
5. To decline, first add a remark explaining the reason. Next, click the red **Decline** button.

Allowed actions based on approval status

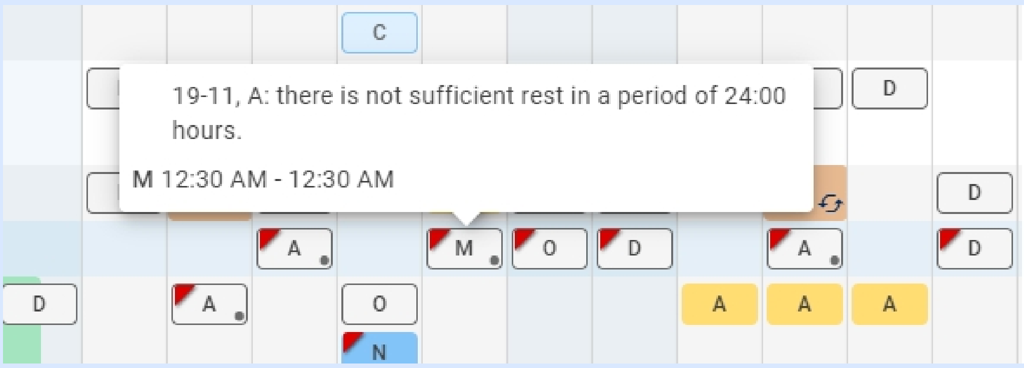
Actions on a shift with an employee realization are limited based on its approval status:

- **Open**: No actions are allowed until the realization is approved or declined. A schedule cannot be approved while there are open realizations.
- **Approved**: Editing and deleting the shift is allowed, but deleting will also remove the realization. The shift cannot be moved in the schedule.
- **Declined**: Editing and deleting the shift is allowed, with the realization being removed in both cases. The shift cannot be moved in the schedule.

4.3.5 View violations

Violations in the schedule are indicated by red, orange, or blue colored triangles in the upper-left corners of the concerned shifts. Hovering over such shifts will display a text with details. As a planner, you may need to take necessary actions to resolve the violations.

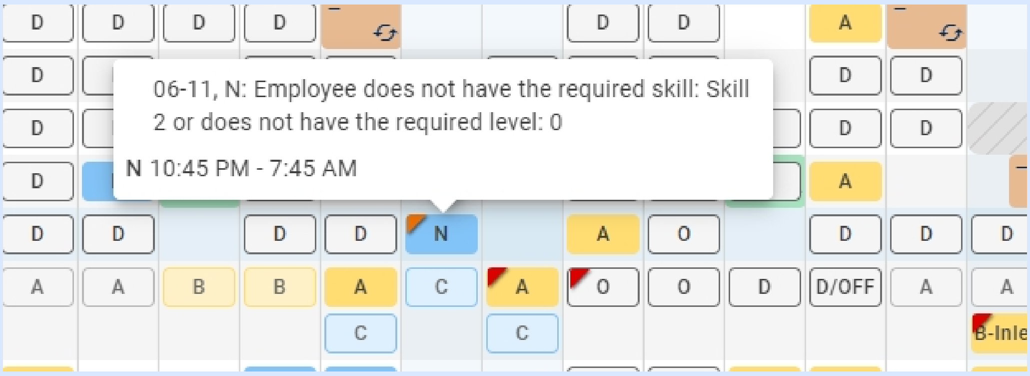
- Labor rule violations are indicated by a red triangle in the upper-left corner.

> Example
>
> This screenshot shows several shifts with labor rule violations and a sample text of what could be displayed when hovering over such a shift.
>
> 
>

- Violations due to skills mismatch are indicated by an orange triangle in the upper-left corner.

Example

In this screenshot, the employee doesn't have the required skill or the required level of the skill to carry out the shift N.

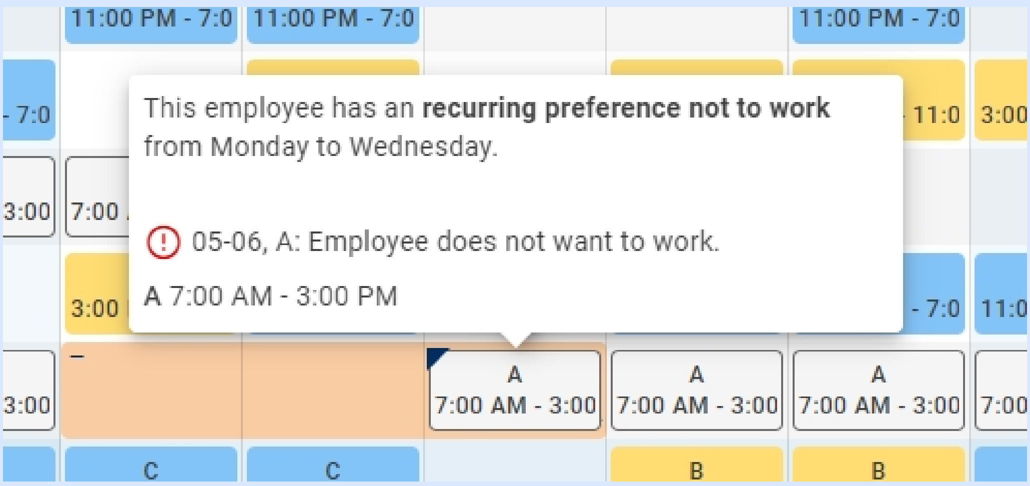


- Violations due to an employee scheduling request mismatch are indicated by a blue triangle in the upper-left corner.

There's no differentiation between approved and unapproved requests. Violations on both are treated the same and are visualized with the same dark blue color.

Example

In this screenshot, the employee requests not to work from Monday to Wednesday. A violation is shown because a shift has been scheduled on a Wednesday.



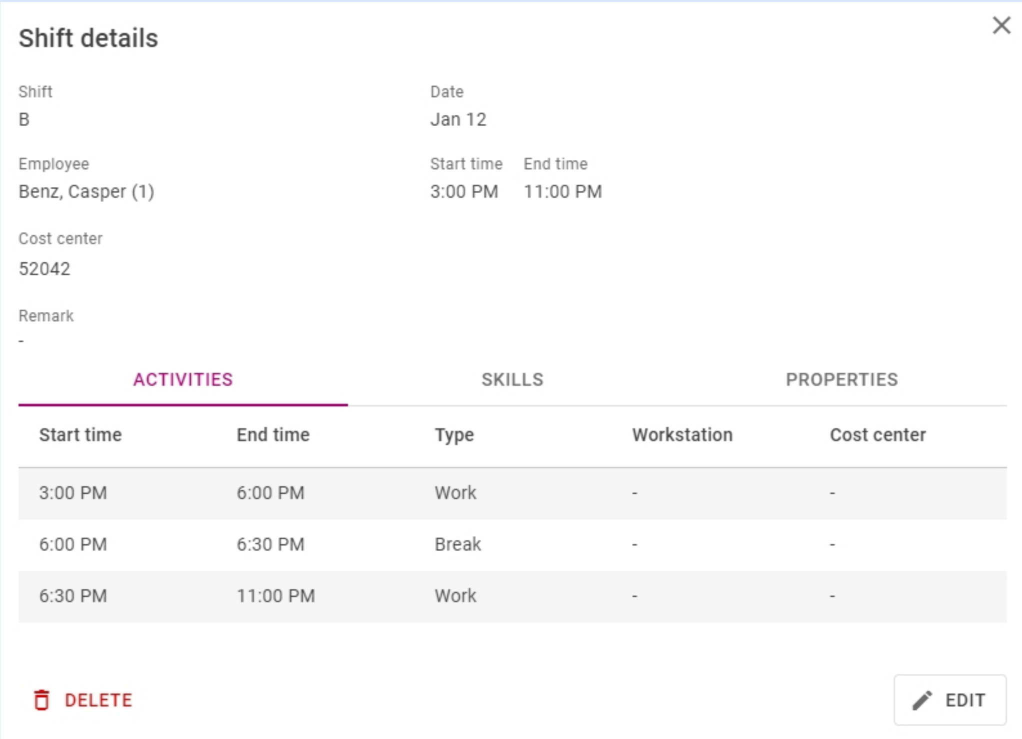
4.3.6 Edit shift

You can edit both assigned shifts and vacant shifts in a schedule which has a status of either **Plan** or **Published**.

To edit a shift:

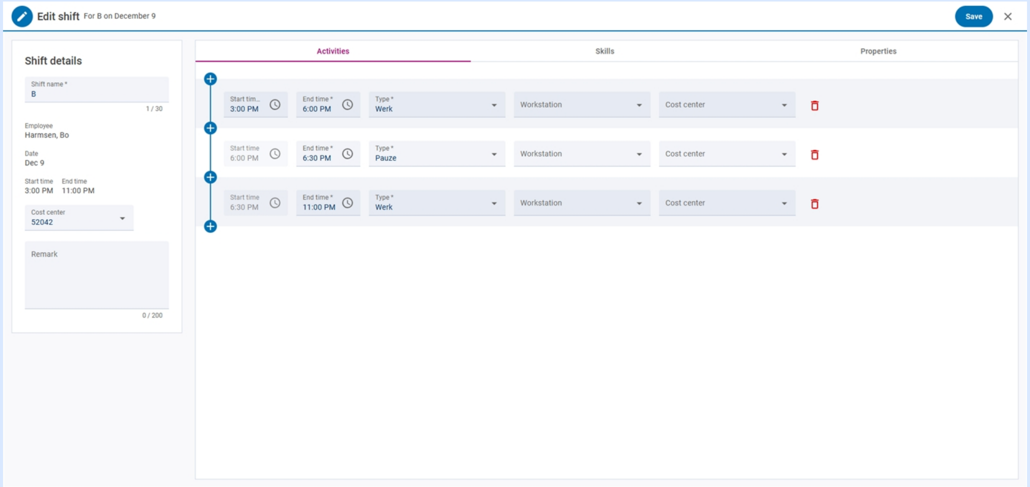
1. Click the shift from the schedule. Shift details are displayed in a pop-up window.

Example



2. Click **Edit** to open the **Edit shift** screen.

Example



3. Check the section "Editable fields" on page 43 below for instructions if you want to make changes to the shift.

> When adjusting the **Start** and/or **End time**, use the drop-down for quarters (e.g., 8:15), but feel free to type any specific time in minutes (e.g., 8:11) directly.

4. To save your changes, click **Save**.

   The schedule is displayed. A dot in the lower-right corner of the shift block indicates that the shift has been manually edited.

5. To discard your changes, click the cancel button **X**. You'll be asked to confirm whether to proceed or go back to the Edit shift screen.

Editable fields

Assigned shifts and vacant shifts share the same set of editable fields.

Shift name

You can change the shift name. Renaming a shift based on a shift type (duty set duty) will not affect its classification in staffing counters; it will still count as the original shift type. For more information, see "View shift counters" on page 64.

Cost center

The cost of a shift (for example, its working hours) is attributed to a cost center, which is defined in the back end and assigned to shift types.

You can also change the cost center of a shift using **Team Scheduler App**. For example, when assigning a shift to an employee who belongs to a different cost center.

- Cost center is not mandatory. You do not have to choose a cost center for a shift.
- You can only choose cost centers that are valid for the department on the start date of the shift.

Remark

It's possible to add a comment or other explanatory information in the **Remark** field. The allowed maximum length is 200 characters.

A shift with a remark is indicated by an asterisk in the upper-right corner of the shift block in the schedule.

Be aware that once saved, the remark will be visible in ORTEC Workforce Scheduling for Employees.

Activities

You can add, update, or delete an activity in a shift.

To add an activity:

1. Click the plus icon **+** at the desired position of the new activity.
2. Check the **Begin time** and **End time**. Make adjustments as necessary.
3. Search for and/or select the activity **Type** from the drop-down list.
4. Click **Save**.

To update an activity:

1. Click the field that you want to change.
2. Select the new setting from the drop-down list.
3. Click **Save**.

Be aware of the following rules when adjusting the time of an activity:

- The maximum duration of an activity is 24 hours.
- A shift can't overlap with either the previous or the next shift.

  The application doesn't check the adjacent shifts when you set the time. However, if you chose a begin time that overlaps with the previous shift or an end time that overlaps with the next shift, you'll get an error when trying to save the changes.
- You can change the **Begin time** only for the first activity in the shift.
  - The earliest possible starting time is 12:00 AM of the day.
  - For any other activity, the **Begin time** is automatically set to the **End time** of its preceding activity.
  - Changing the **Begin time** of the first activity has no impact on the subsequent activities.
- You can change the **End time** of any activities.
  - The maximum duration of an activity is 24 hours. You can select an end time for an activity up to 24 hours from its starting time.
  - Once the **End time** of an activity is changed, all the subsequent activities are adjusted automatically.

To delete an activity:

1. Click the trash bin icon of the activity to be removed.
   Note that a shift requires at least one activity. It's not allowed to delete all the activities from a shift.
2. Click **Save**.

Skills

A shift may require one or more skills at different levels. An employee assigned to such shifts must have the proper skills to avoid violations.

Skills are usually defined on the shift type, while in certain cases the planner has to modify the required skills. For example, when there is a staffing issue and no suitable employees available, the planner may decide to lower the required skill level.

To add a skill:

1. Select the **SKILLS** tab in the **Edit shift** screen.
2. Click **ADD SKILL**.
3. Choose a skill from the drop-down list. Only those skills that are valid for the current department are available in the list.
4. Choose the required level of the skill.
5. Click **ADD**.
6. Save your changes.

To update a skill:

1. Select the new settings from the drop-down lists of the skill that you want to change.
2. Save your changes.

To delete a skill:

1. Click the trash bin icon of the skill to be removed.
2. Save your changes.

> Required skills that are not defined on the shift level are not shown on the **SKILLS** tab. For example, skills defined as mandatory for the department but not on the shift level are not displayed.

Properties

An application manager can define custom properties of the Boolean type (yes/no) in the back end. Shift properties of this type are often used in day-to-day planning. Examples of such properties are "work from home" and "use company car".

To change the properties :

1. Select the **PROPERTIES** tab in the **Edit shift** screen.
2. Check the default and current settings of the properties.
   Only those properties that are valid for the current department are available.

3. Use the toggle switch to change the value of a property if needed.
4. Save your changes.

4.3.7 Delete shift

Both assigned and unassigned shifts can be deleted from a schedule as long as the schedule's status is not **Closed** or higher.

To delete a shift assigned to an employee:

1. Click the shift to display the shift details.

2. Click **DELETE**. The shift will be permanently deleted from the schedule after your confirmation.

> When you delete a shift assigned to an employee, it's deleted from the schedule itself.

To delete an unassigned shift:

1. Go to **Vacant Shifts**.

2. Select the shift you want to delete. The shift details are displayed.

3. Click **DELETE**. The shift will be permanently deleted from the schedule after your confirmation.

4.3.8 Fix and unfix shifts

As a planner, you can fix or unfix shifts in the schedule.

Fixed shifts cannot be moved around in the schedule, nor can they be deleted. A typical use case of fixed shifts is *pre-planning*, where you do not want the Optimizer to replan certain shifts. A shift may also be fixed automatically, for example, when being replaced by an illness shift.

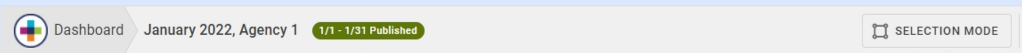
Fixed shifts have to be unfixed before you can handle them as normal shifts again.

Selection mode

To be able to fix and unfix shifts, you first need to activate the selection mode in one of the following ways:

- click the **SELECTION MODE** button in the upper-right corner

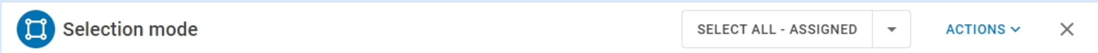
  Example

- hold down the **Ctrl** key when selecting a shift
- hold down the **Ctrl** key when drawing a rectangle with the mouse to select multiple shifts

Once the selection mode is activated, an action toolbar shows in the upper-right corner.

Example



If there is no shift selected yet, you can click a shift to select it or draw a rectangle with the mouse to select multiple shifts.

To add or remove shifts from your selection:

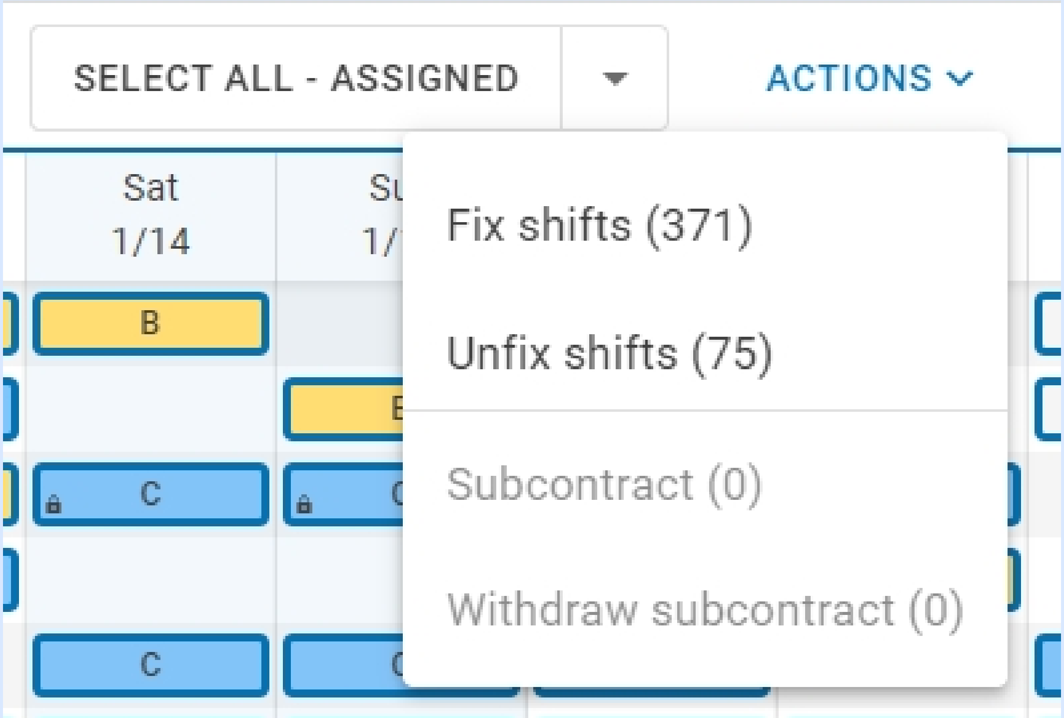
- hold down the **Ctrl** key and click a shift to add it, or remove it if it's already in the selection
- hold down the **Ctrl** key and draw a rectangle with the mouse to add multiple shifts

You can also use the **SELECT ALL** option to select all the assigned shifts in the schedule.

The numbers shown in the two options, **UNFIX SHIFTS** and **FIX SHIFTS**, indicate respectively how many shifts in the selection will be unfixed or fixed.

Example

In the example below, there are 371 fixed shifts and 75 unfixed shifts.



To deselect all the shifts, choose **SELECT NONE** from the drop-down list or click anywhere in the schedule with no valid shift.

To exit the selection mode, use the **Esc** key or click **X** on the action toolbar.

Fix shifts

To fix one or more shifts:

1. Select the target shifts in the schedule.
2. Check the number shown in the **ACTIONS** option > **FIX SHIFTS (n)** option, which is the total number of selected shifts.
3. Click **ACTIONS** > **FIX SHIFTS**.

   If successful, a small lock icon will appear in the lower-left corner of the shifts.

Example

Unfix shifts

To unfix one or more shifts:

1. Select the fixed shifts that you want to restore to the normal state.
2. Check the number shown in the **ACTIONS** option > **UNFIX SHIFTS (n)**, which is the total number of selected shifts.
3. Click **ACTIONS** > **UNFIX SHIFTS**.
   If successful, the small lock icons in the lower-left corner of previously fixed shifts will disappear.

Constraints

When using the selection mode, be aware of the following constraints:

- It's not possible to fix or unfix shifts in a schedule with a status higher than or equal to **Closed**.
- It's not possible to fix or unfix vacant shifts.
- It's not possible to fix or unfix subcontracted shifts.
- It's not possible to move shifts or check shifts details.
- It's not possible to select, fix, or unfix shifts from a different department.

4.3.9 Subcontracting shifts

It's possible to subcontract vacant shifts to other departments with the goal of finding an external solution to your staffing problem. The receiving department receives your shift in their own vacant shift section and can look for a solution in their department.

If the receiving department found a suitable employee for your shift, and once the subcontract status is finalized, you'll see that employee in your schedule as a borrowed employee. It's also possible for the receiving department to decline your subcontracted shift, for example because they can't find a solution.

Subcontracting shifts is based on the **Flexpool** feature in ORTEC WS and follows the same flow and logic.

> **ORTEC WS for Team Schedulers** supports both the requesting and receiving part of the subcontract flow. Both parts are explained below.

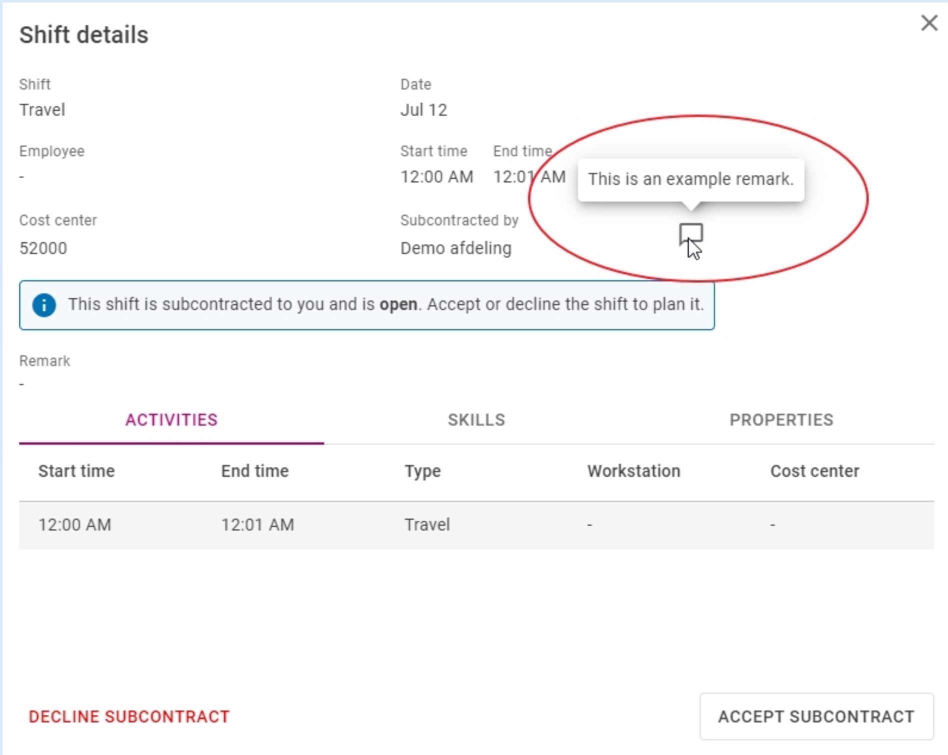
Request subcontract

1. For a single shift, select - in the **Vacant shifts** section - a shift. In the **Shift details** window, select **ACTIONS** > **Subcontract shift**. Continue with step 3.
2. 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** > **Subcontract (n)**.
3. Select the **Department** and (optional) add a **Remark**.
   - **Department**

     > The available departments to subcontract to are determined by the **Access Control** permission SHIFT_SUBCONTRACT_TO, more specifically for the departments for which this permission is granted.

   - **Remark**
     (Optional) Add a short explanation on why the request has been issued. This remark will be visible by the receiving department in the shape of a text balloon.

Example



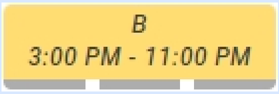
4. Click **SUBCONTRACT**.
   A subcontract request is sent to the selected department. This department will now either accept or decline the request.

   Until then, the status of the request is **Open**. Once subcontracted shifts are finalized by the receiving party, they are moved from the **Vacant shifts** to the schedule (status **Final**).

Subcontracted requests have multiple statuses which are also indicated by the progress bars below the shift:

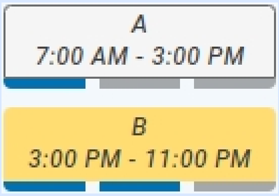
- **Open**
  A subcontract request is sent. The shift remains in the **Vacant shifts** section.

  Example

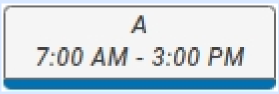
- **In progress**
  The subcontract request is accepted by the receiving department (one blue progress bar) or already in concept planning (two blue progress bars). The shift remains in the **Vacant shifts** section.

  Example

- **Final**
  The subcontract request is accepted, assigned and finalized by the receiving department. The shift is moved to the schedule and assigned to an employee of the receiving department.

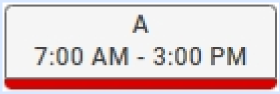
  Example

- **Declined**
  The subcontract request is declined by the receiving department. The progress bar turns red. Once the shift is moved to an employee in the schedule, the red progress bar will be removed.
  Note: When the shift is moved back to the **Vacant shifts** section

afterward, the red progress bar will appear again.

Example



5. To view the details of a subcontracted shift, select it to open the **Shift details** window. At the bottom of this window you can view to which department the request has been sent and the status of the request.

When the request is open, the shift cannot be deleted or (un)fixed. Please note that you're still able to edit the shift. For example, change the start and end time. Once the request is accepted (status **In progress**), this is no longer possible. Only after the shift has been assigned and finalized, the shift can be edited again. For example, to add a remark.

Withdraw subcontract

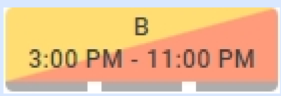
Only shifts with an outstanding subcontract request (status **Open**) and available in the **Vacant shifts** section can be withdrawn. If the shift has been offered for bidding in the receiving department, the subcontract request cannot be withdrawn and the **WITHDRAW SUBCONTRACT** button is not available.

- For a single shift, select - in the **Vacant shifts** section - a shift. In the **Shift details** window, select the **WITHDRAW SUBCONTRACT** button.
- 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 subcontract (n)**.

Handle a received subcontract request

1. Find, in the **Vacant shifts** section, a shift that has been subcontracted to you. They are recognizable by being partially salmon-colored.

Example



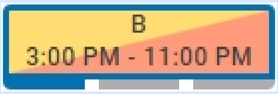
- For a single shift, select one. In the **Shift details** window, select either **DECLINE SUBCONTRACT** or **ACCEPT SUBCONTRACT**.

- 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** and select either **Accept subcontract (n)** or **Decline subcontract (n)**.

> - Declining a subcontract request isn't possible when the shift is fixed or offered to employees.
> - After declining, the requesting department will be notified with a red bar beneath the shift.

2. After a subcontracted shift has been accepted, the first progress bar turns blue.

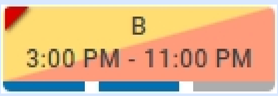
Example



> It's not required to first accept a shift before assigning it to an employee. Assigning a subcontract shift can also be done in status **Open**. By assigning it in this status, you'll automatically accept the subcontracted shift.

3. To assign a shift, make sure the **Selection mode** is disabled; You might need to click the cross in the top-right corner.
4. Assign the shift to an employee by drag-and-drop.

Example



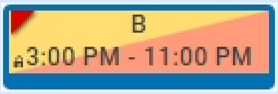
> The department that sent the subcontracted shift can't see the assigned status of the shift yet. They will see the assignment only after finalizing the subcontracted shift (see next step).

5. To finalize subcontracted shift(s):
   - For a single shift, select a shift. In the **Shift details** window, select the **FINALIZE SUBCONTRACT** button.
   - 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** > **Finalize subcontract (n)**.

To finalize the entire schedule, make sure to first select **SELECT ALL - ASSIGNED** from the drop-down list.

After a subcontracted shift has been finalized, the entire progress bar turns blue

Example



6. To return to the concept status:
   - For a single shift, select a shift. In the **Shift details** window, select the **BACK TO CONCEPT** button.
   - 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** > **Back to concept (n)**.

4.3.10 Offering shifts

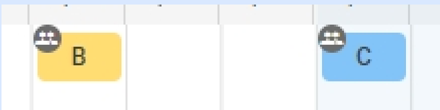
Offer one or more shifts to employees. Offering a shift will make it available in **ORTEC WS for Employees** / **ESS7** for picking or bidding (depending on the **ESS** configuration).

This functionality is only active when the **Shift Bidding** module is enabled in **ORTEC WS**. To include Shift Offering data, a Shift Offering tenant is also required. The feature must be activated on individual basis. Please contact your ORTEC representative.

Offer shift(s)

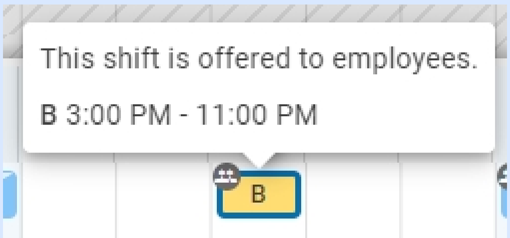
1. For a single shift, select - in the **Vacant shifts** section - a shift. In the **Shift details** window, select **Actions** > **Offer shift**. Continue with step 3.
2. For multiple shifts, hold down the **Ctrl** key when drawing a rectangle with the mouse or selecting multiple shifts. In the upper-right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

Example



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

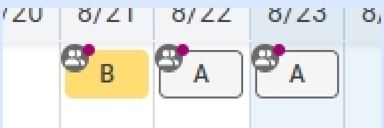
Example



Once an offered shift is picked by an employee, it's automatically assigned to this employee and the icon will disappear from the shift.

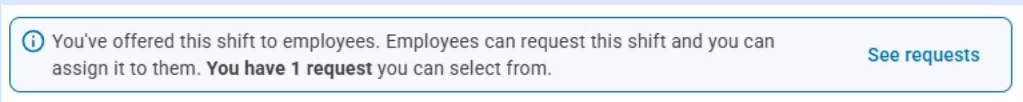
6. With Shift Offering data included, you can see if there are employee requests via a distinct red dot added to the Shift Offering icon.

Example



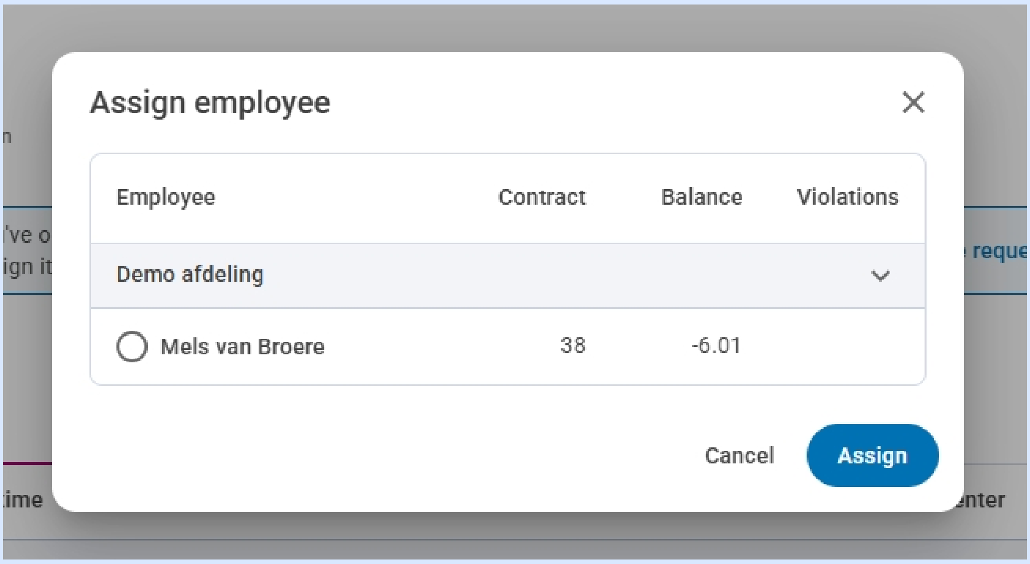
7. Select a shift to view the **Shift details** window for more information about the number of employee requests.

Example



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

Example



9. 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 if the shift would be assigned in the Ad Hoc Planner / Shift Offering (e.g. set duty request statuses, send notifications).

Withdraw offered shift(s)

Withdrawing the offer means the shift is no longer available for picking or bidding in **ORTEC WS for Employees** / **ESS7**.

- For a single shift, select - in the **Vacant shifts** section - the offered shift. In the **Shift details** window, select the **WITHDRAW OFFER** button.
- 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**.

4.3.11 Employee proposal

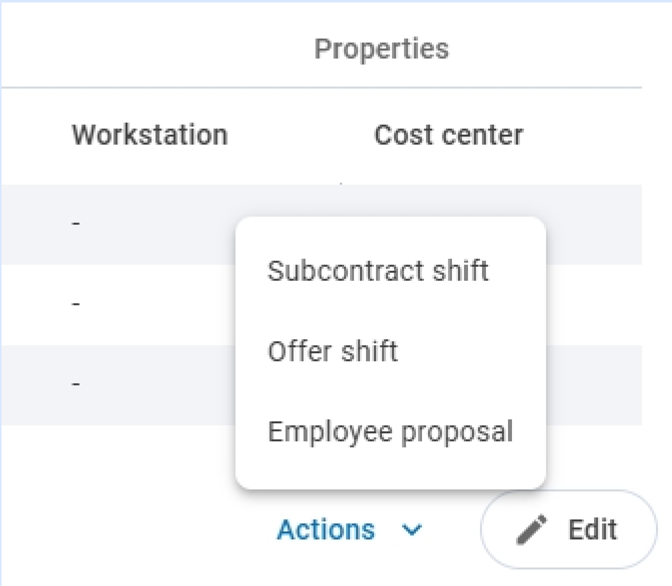
Request an employee proposal for a single vacant shift and assign one of the available employees to that shift. Available means:

- no overlapping shifts
- not reported ill
- not having an approved leave request that overlaps with the shift

Request employee proposal & assign employee

1. For a single shift, select - in the **Vacant shifts** section - a shift. In the **Shift details** window, select **Actions** > **Employee proposal**.

Example



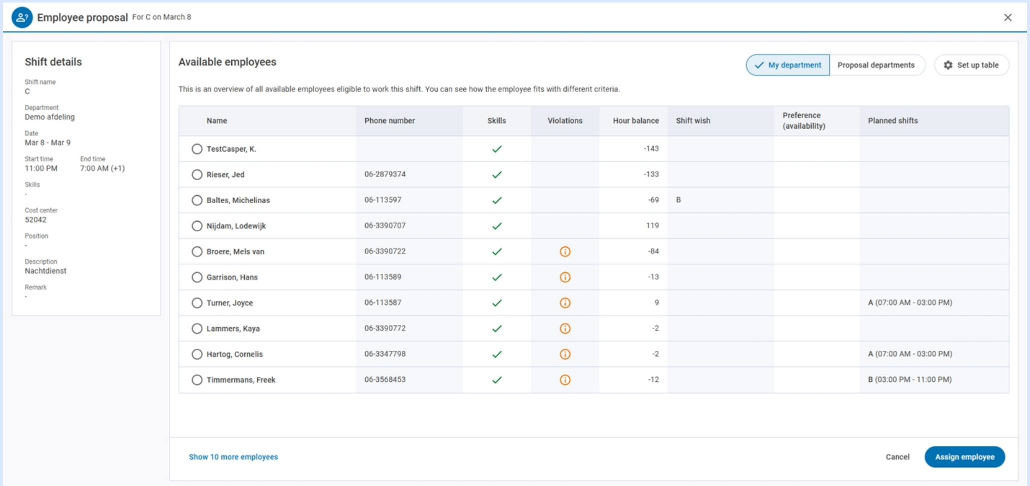
2. In the **Employee proposal** window, view the **Shift details** in the pane on the left and the **Available employees** for this shift in the pane on the right.

Example

- The employees are sorted based on the order of the columns shown: first, employees with the right skills; then, employees without additional violations; and finally, employees with the highest/lowest balance (depending on its sorting setting).

- To arrange the columns to your own preference, select **SET UP TABLE** in the top right corner. Select the columns you want to show and adjust the order. Click **SAVE**.

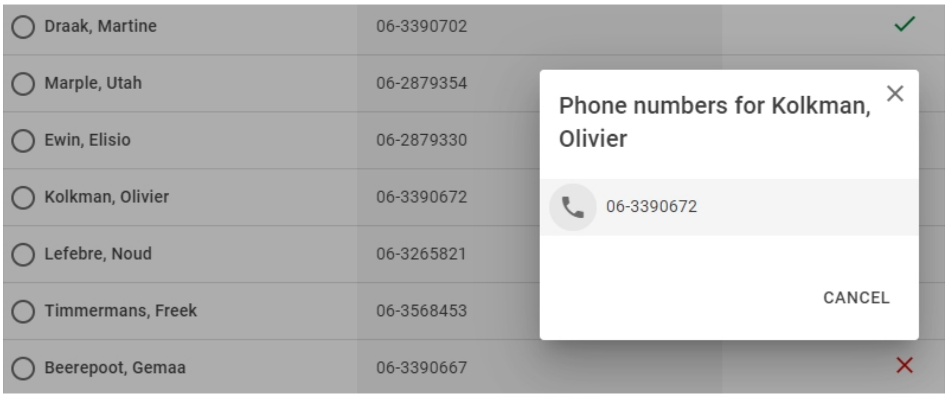
- (Optional) With the permission Borrow employee via the employee proposal (proposal departments) in place, you can use **Proposal departments** when searching for a suitable employee. When chosen, the employee will automatically be borrowed for the day of the shift and shown in the schedule.



3. Select an available employee, based on the information supplied in the columns:
   - **Name**: the name of the available employee
   - **Department**: With **Proposal departments** enabled, a column with the department name of the employee is shown.

- **Phone number**: the phone number(s) of the employee

With a call app such as Teams or Skype installed on your device, you can directly call the employee to check availability. First select the phone number from the list, then the phone icon.



- **Skills**: shows whether the employee has the required skill(s) for the shift.
- **Violations**: shows whether the addition of this shift would cause violations for the employee, based on the configured labor rules in **ORTEC WS**.
- **Balance**: is a configurable column showing an account balance. In your configuration, the name might differ.
- **Shift wish**: Displays the relevant shift wishes of an employee, including self-scheduling wild cards.
- **Preference (availability)**: Displays the relevant work/do not work requests of an employee.
- **Planned shifts**: Displays shifts already assigned to the employee that overlap with the day of the shift proposal.
- **Self-scheduling points**: Displays the self-scheduling points of an employee. This column is visible whenever there's an active scheduling round assigned to the scheduling period.

4. Click **Assign employee** or, when using **Proposal departments**, click **Borrow employee**.

4.3.12 Send shift(s) to central department

A central department schedule contains the shifts and employees from multiple departments. Employees from decentralized departments are automatically included in the central department. Schedulers can decide to send one or more shifts to the central department. From there, shifts can be (re)assigned to employees from other departments.

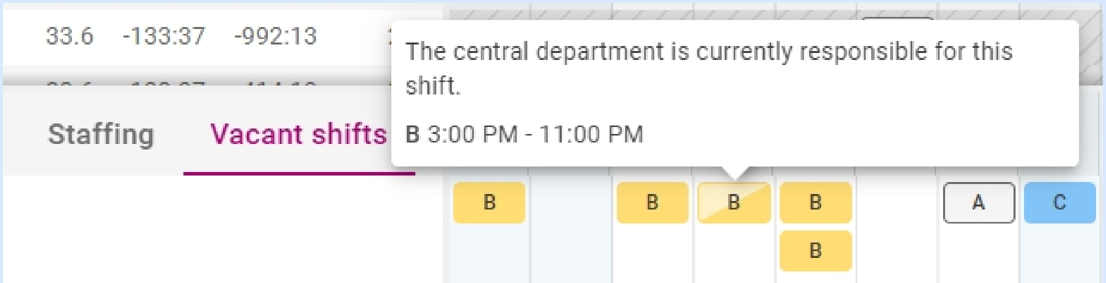
- This feature requires the activated UseCentralDepartments functionality in **ORTEC WS**.
- This feature supports the decentral side of the central departments functionality. The central department side isn't supported and it's expected that central department planners use the **ORTEC WS Client**.

1. Select the shift(s) you want to send to the central department:
   - To select one or more shifts, hold down the **Ctrl** key.
     - Select one or more shifts.
     - Select multiple shifts at once by drawing one or more boxes.
   - To select all assigned or vacant shifts, click the **SELECTION MODE** button, and from the drop-down list, select **Select all - Assigned** or **Select all - Vacant**.
2. In the upper-right corner, click **ACTIONS** > **Send to central department (n)**.

Result

Shifts that are sent to a central department have a distinct visualization. The shift details dialog shows additional information about the shift being sent to a central department.

Example



Access Control permission

Once a shift is sent to a central department, the user can no longer do any changes to this shift. However, the **Access Control** permission 'Edit shifts that are sent to a central department' makes it possible to (only) edit the contents of the shift, even though it's currently in the central department. The permission is disabled by default.

4.4 Vacant shifts

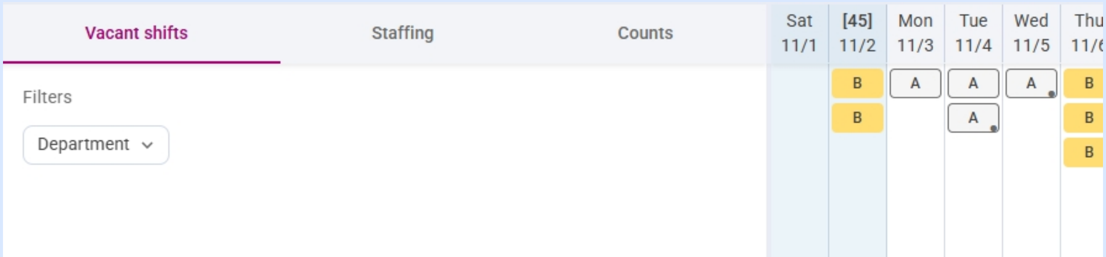
Vacant shifts are shifts in the schedule that are not assigned to an employee yet.

- The vacant shifts are shown for each day in the period. Every vacant shift is displayed as a separate entry. They are sorted primarily by start time and secondarily by name in case of the same start time.

- Quickly filter the **Vacant shifts** section on specific departments via the **Department** filter. This is helpful when shifts are subcontracted from multiple departments (e.g. in a Flexpool).

- You can "Assign shifts" on page 68 to employees from the **Vacant shifts** section.

Example



4.5 Staffing

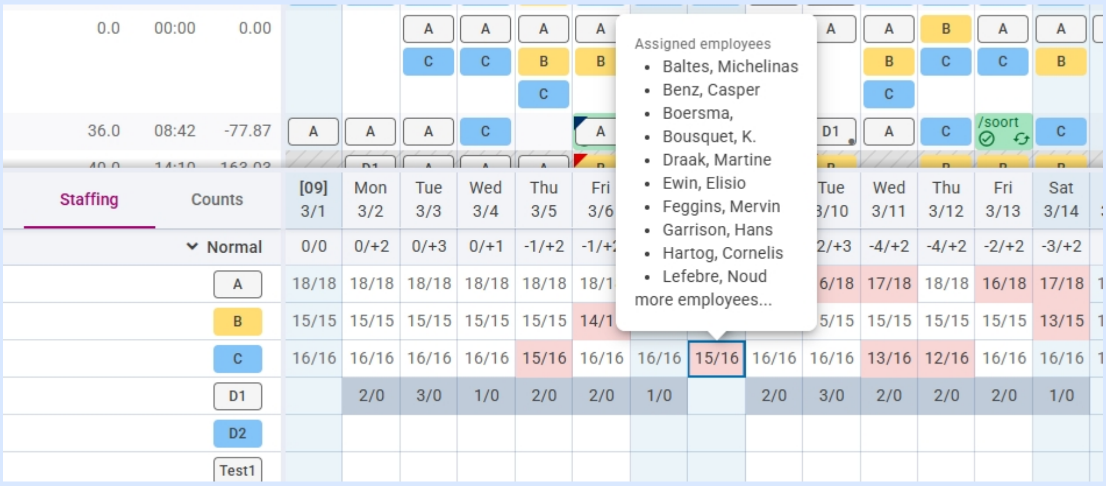
The **Staffing** section shows the staffing situation for each day in the period. The staffing data is categorized into "Normal and special shifts" on page 64.

You can carry out the following planning actions from this section:

- "View shift counters" on page 64: view planned shifts versus shift demand
- "Adjust shift demand" on page 65: Increase or decrease shift demands
- "Assign shifts" on page 68: Assign shifts to employees

Example

Hovering over a shift counter in the **Staffing** tab shows the employees that are assigned to that shift.



4.5.1 Normal and special shifts

Normal shifts represent the demand in a department in a certain period for regular working activities. For example, the shifts Morning, Noon, and Night in a department. They're created per department.

Special shifts usually represent non-working activities, such as trainings, travel, and scheduled leave. Special shifts don't have any demand. The planner assigns them to the concerned employees in a schedule. Also, special shifts are not specific to a department, but relevant for the entire organization.

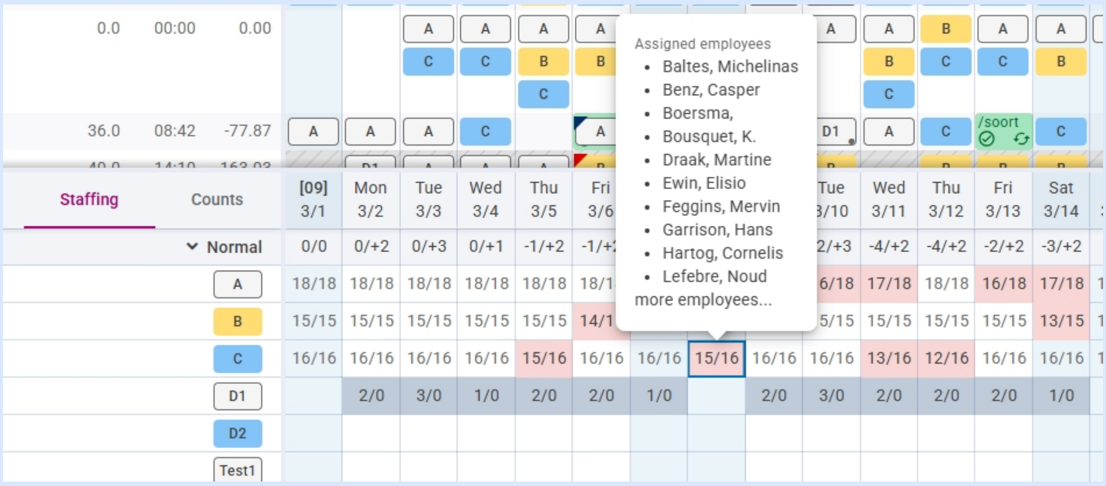
4.5.2 View shift counters

Every entry for a **Normal** shift in the **Staffing** section is a counter in the following format:

The number of planned shifts / The total demand for the shift

Example

In this example, on March 08 (5/4), there are 5 **A** shifts planned and there's a demand for 4 **A** shifts. Note that entries with surplus or shortage of planned shifts have different background colors.



4.5.3 Adjust shift demand

Adjust the demand for a shift on a specific date in the **Staffing** section of the plan board.

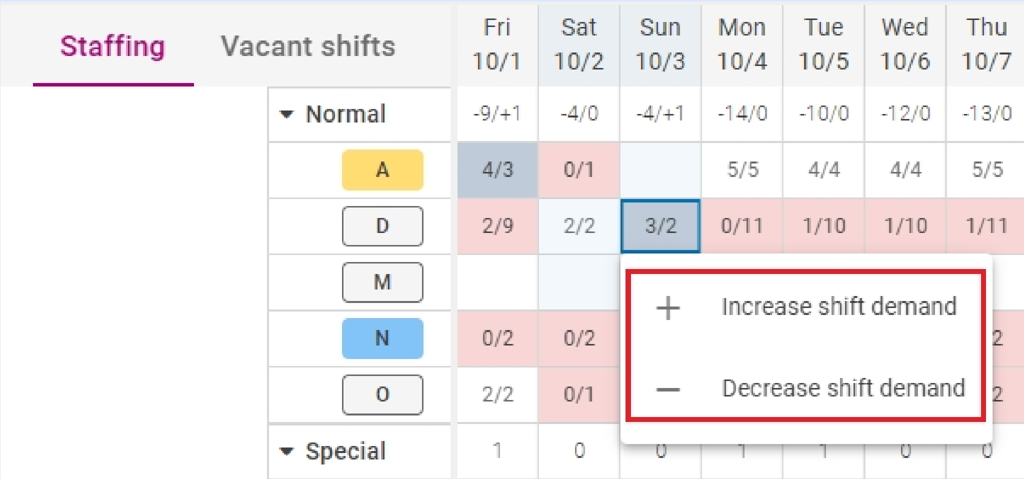
There must be a demand in ORTEC WS for the corresponding date. If it doesn't exist the demand won't increase/decrease.

Increase and decrease shift demand

To adjust the shift demand:

1. Go to **Staffing**.
2. Click the shift you want to adjust.
3. Select **Increase shift demand** or **Decrease shift demand**. The shift demand is increased or decreased by one for that specific day.

Example



Update vacant shift

The application updates the vacant shifts in accordance with the changes in shift demands:

- When increasing the shift demand for a certain shift type, if there is an understaffing that is not covered by the existing vacant shifts, a new vacant shift will be placed.
  Example: The shift counter currently shows 2/2 (2 planned, 2 demanded). The planner increased the demand by 1. The shift counter now shows 2/3 , which means there is an understaffing of 1.

  If there is already a vacant shift of this type, then there is no change to the vacant shifts section. Otherwise a new shift will be added in the vacant shifts section.

- When decreasing the shift demand for a certain shift type, a shift of this type should be removed from the vacant shift section if there is no understaffing for this shift type.
  Example: The shift counters currently shows 2/3 (2 planned, 3 demanded). The planner decreased the demand by 1. The shift counter now shows 2/2 , which means there is no understaffing anymore.

  If the vacant shift section contains a shift of this type, then that vacant shift will be removed.

4.6 Counts

Counts are daily calculations, also known as vertical calculations. They may include budget and costs, staffing requirements, employee availability, and skill matching. By performing these calculations, organizations can create optimized schedules that meet operational needs while also taking into account factors such as employee preferences, labor regulations, and cost efficiency.

Example

The **COUNTS** tab is always visible.

VACANT SHIFTS STAFFING **COUNTS**		Sun 2/4	Mon 2/5	Tue 2/6	Wed 2/7	Thu 2/8	Fri 2/9	Sat 2/10	Sun 2/11
Budget	176978	8138	5137	5280	5280	5280	5445	8365	8138
Costs	158108	7689	4816	4678	4358	4246	5517	7048	8194
Result	€ 18870	448	321	602	922	1034	-72	1317	-56
Shifts Total	897	31	33	33	30	30	33	29	31
Day shifts	315	11	11	11	10	10	11	10	11
Evening shifts	286	10	11	11	10	10	11	10	10
Night shifts	296	10	11	11	10	10	11	9	10
Work hours	6729:30	232:30	248:00	247:30	231:00	221:30	247:30	217:30	232:30
Skill - Admin		1-7	1-7	0-10	0-6	0-7	1-6	1-5	0-5
Number of vacant shifts		0	4	0	2	2	1	2	0

4.6.1 Visualization of attributes

The following attributes are taken from the daily calculation set and used for visualization purposes:

- Name of the calculation
- Hours vs. decimals settings (for the calculation rules that support these)
- Currency sign (for the calculation rules that support it)
- The order of calculations
- The parent / child relations between calculations

  - Only one parent / child layer is supported, meaning it's not possible for a child to have another child.
  - When child calculations aren't immediately visible, expand the parent calculation.

- To keep the color palette consistent, only the default green, orange, and red ORTEC color ranges are supported. Colors that fall outside of the preconfigured ranges are shown as gray.
- The master schedule status settings aren't considered unless all statuses are unmarked. In that case, the calculation will be invisible in the Team Scheduler app.

4.6.2 Performance

A caching mechanism is used for vertical calculations, similar to how it's used for the employee calculations. This means that the results of calculations are stored in a Team Scheduler repository. The first time a schedule is opened, the calculations are loaded and stored in the repository. This might result in a longer loading time of the schedule. When opening the same schedule later, the calculations are retrieved directly from the Team Scheduler repository. This results in a fast load time.

To make sure calculations are in sync with the Client there are update mechanisms in place:

- Whenever a scheduling action is done in Team Scheduler the calculations for that specific day are updated.
- A nightly update for all calculations. This is to make sure they are synchronized at least once every 24 hours in case of backend changes (e.g. import of an account category line, or import of an employee attribute that influences the calculation).
- Because of this asynchronous update mechanism there is a slight delay visible after a plan action is done. The length of this delay depends on the configuration of the calculations and the size of the department.

> Depending on the complexity of the vertical calculations, the number of simultaneous plan actions across the organization, and the department sizes, there can be a significant load on the server process that is calculating/updating the calculations. The server load per calculation update from the Team Scheduler app is bigger than a calculation update from the ORTEC WS Client plan board because there is no buffer mechanism in place. Please consider this when implementing vertical calculations. In case of doubt, please contact ORTEC Product Support. We will monitor the situation and work on performance improvements where necessary.

4.7 Assign shifts

In addition to supporting the optimizer that automatically assigns shifts to employees in a scheduling period, **Team Scheduler App** allows planners to manually assign shifts to employees in multiple ways, as explained below.

4.7.1 From Vacant shifts

To assign shifts one at a time from the **Vacant shifts**:

1. Drag the shift to the row of the employee to whom you want to assign it.

   If the shift assignment is not feasible, for example, when a scheduling period is in status **Closed** or higher, or when a shift assignment overlaps with an existing shift, an error message is displayed indicating that the shift can't be assigned, and the shift is placed back in the **Vacant shifts** section.

4.7.2 From Staffing

From the **Staffing** section, it's possible to assign one or more shifts of a selected shift type. This provides more flexibility for the planner to assign shifts to different employees and also on different days.

To assign shifts from the **Staffing** section:

1. Click **Staffing**. The shift types relevant for the department are listed.
2. Hover over the desired shift type. A radio button will be displayed next to it.
3. Select the shift type. Note that the header changes to indicate the planning mode.
4. Move the mouse pointer to the schedule, where it changes to either the icon (+) or the icon (-) indicating whether or not you can assign a shift to a specific employee on a specific day.
5. Click on the schedule to assign shifts to individual employees on specific days.
6. To select another shift type, select the corresponding radio button in the **Staffing** section.
7. To end the planning mode, either press Esc or click close in the upper-right corner of the screen.

- In this method, with each click, the application first assigns the vacant shifts. When all the vacant shifts in a day are assigned, with the next click, an additional shift is created and assigned. Be aware that you might be creating an overstaffing situation.

- Any special shift with the 'Plan contract hours' option enabled in ORTEC WS, will automatically be set to the employee's contract hours.

4.7.3 From another employee

To assign a shift from one employee to another, drag it from its position to the row of the employee to whom you want to assign it. While dragging a shift over a row, if an assignment isn't feasible, there will be a hint text indicating the reason.

Example

If you drop the shift on a non-feasible row, it will move back to its original position.

If you drop the shift where assignment is feasible, the shift will be assigned to the employee and the schedule will be updated.

4.7.4 Switch shifts

To swap overlapping shifts, first drag and drop the shifts to the **VACANT SHIFTS** section, then reschedule.

4.8 Unassign shifts

4.8.1 Unassign one shift

Drag it from the schedule to the lower half of the screen (either **Vacant shifts** or **Staffing**).

4.8.2 Unassign multiple shifts

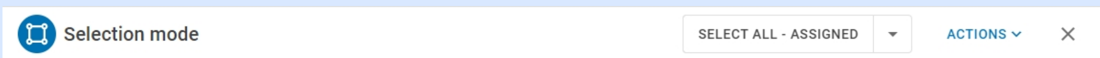
Selection mode

To be able to unassign multiple shifts, you first need to activate the selection mode in one of the following ways:

- click the **SELECTION MODE** button in the upper-right corner
- hold down the **Ctrl** key when selecting a shift
- hold down the **Ctrl** key when drawing a rectangle with the mouse to select multiple shifts

Once the selection mode is activated, an action toolbar shows in the upper-right corner.

Example



If there's no shift selected yet, you can click a shift to select it or draw a rectangle with the mouse to select multiple shifts.

To add or remove shifts from your selection:

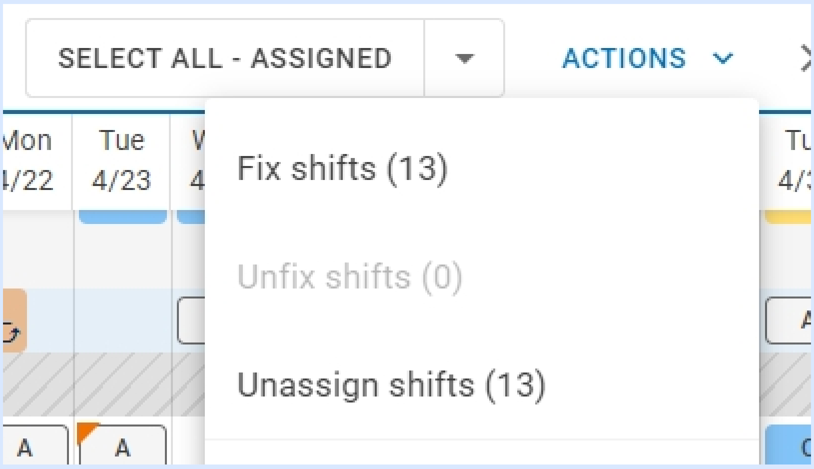
- hold down the **Ctrl** key and click a shift to add it, or remove it if it's already in the selection
- hold down the **Ctrl** key and draw a rectangle with the mouse to add multiple shifts

You can also use the **SELECT ALL** option to select all the assigned shifts in the schedule.

The number shown in the option **UNASSIGN SHIFTS** indicates how many shifts in the selection will be unassigned.

Example

In the example below, there are 13 shifts selected that can be unassigned.



To deselect all the shifts, choose **SELECT NONE** from the drop-down list or click anywhere in the schedule with no valid shift.

To exit the selection mode, use the **Esc** key or click **X** on the action toolbar.

Unassign multiple shifts

1. Select the shifts that you want to unassign using one of the methods described above.
2. Check the number shown in the **ACTIONS** option > **UNASSIGN SHIFTS (n)**, which is the total number of selected shifts.
3. Click **ACTIONS** > **UNASSIGN SHIFTS**.

4. To confirm, click **UNASSIGN SHIFTS**.
   If successful, the shifts will become available in the **VACANT SHIFTS** section. Also, the **STAFFING** information will be adjusted.

4.9 Optimize schedule

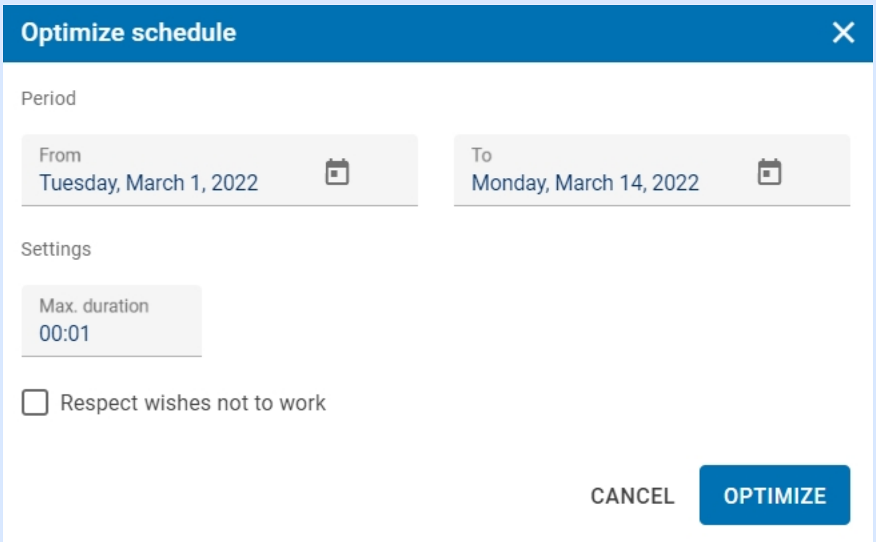
Besides manually assigning shifts, you can also run the optimizer to automatically assign shifts as long as the status of the schedule is **Plan**.

> Optimizer is a separate module of ORTEC WS, which needs to be enabled in the system before it can be used.
>
> Besides having the module active, also the external planner server needs to be installed and configured. In addition, the user needs permission to start the Optimizer within **ORTEC Workforce Scheduling for Team Schedulers**. Without these prerequisites, the optimizer functionality in **ORTEC WS for Team Schedulers** will be turned off.

To run the optimizer:

1. Click **OPTIMIZE SCHEDULE** to open the Schedule optimizer settings window.

Example



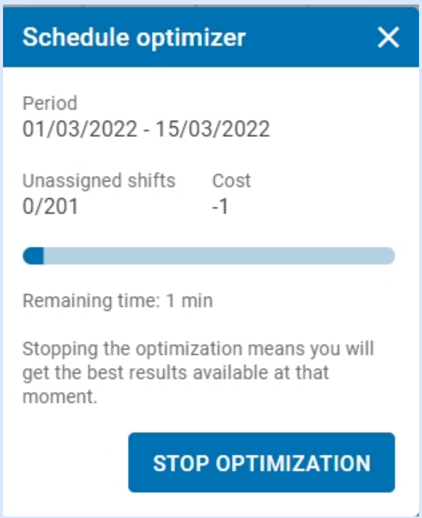
2. Specify the date range of the schedule to optimize. The range is inclusive of **From** and **To** dates.

You can choose dates only within the selected period in the schedule.

3. Enter the maximum duration (in hh:mm format) for the optimizer to run. The highest value allowed is 23 hours 59 minutes.

4. Select **Respect wishes not to work** if you want the optimizer to consider such wishes as constraints.

5. Click **RUN OPTIMIZER**. You'll see the optimizing progress in a pop-up window.

> Example
>
> The optimizer progress window shows 'Initializing' instead of -1 and the **Unassigned shifts** count reflects the proper number of vacant shifts instead of 0.
>
> 
>

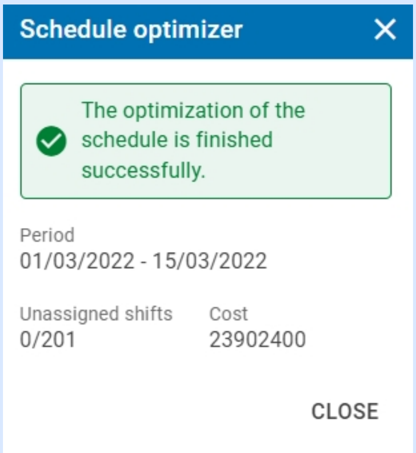
While the optimizer is running, you can continue to use the application, for example, you can navigate to the dashboard and select another period to display. Only the schedule currently being optimized is blocked.

6. You can stop the optimization at any time by clicking **STOP OPTIMIZATION**.

   If you stop the optimizer while it is running, the optimizer will return the results obtained so far and stop further optimization. Consequently, you may have a schedule different from the one before the optimizer was started.

7. When the optimization is completed (or stopped), a dialog box displays the results.

Example



8. Click **CLOSE** to go back to the schedule screen, which now displays the optimized schedule.

4.10 Apply cyclical schedule and shift demands

Roll out a base schedule with a recurring pattern and/or apply shift demands as vacant shifts.

- Both the cyclical schedule and the shift demands are defined in **ORTEC Workforce Scheduling**.
- If **ORTEC Workforce Shift Patterns** is deployed and enabled, the cyclical schedule can also be rolled out based on shift patterns created in ORTEC Workforce Shift Patterns. When applying a cyclical schedule, Team Scheduler uses:

  - The cyclical schedule defined in ORTEC Workforce Scheduling (default); or
  - The shift patterns defined in ORTEC Workforce Shift Patterns when:

    - Shift Patterns is deployed and enabled for the tenant; and

    - The department property UseShiftPatternRollout is set to true for the selected department in ORTEC Workforce Scheduling.

  Rolling out shift patterns uses the same logic as applying a cyclical schedule. The options Apply on sick leave, Apply on off-work and leave requests, and Apply on public holidays are applied in the same way.

- In **ORTEC WS for Team Schedulers** the following options are used by default when applying a cyclical schedule:
  - **Always include the shift no matter what the manpower requirements** to overrule the duty demand; and
  - **Always assign the shift regardless of other non-overlapping shifts** to ensure that non-overlapping shifts from the cyclical schedule are rolled out on days with already assigned shifts.

4.10.1 How to apply cyclical schedule and shift demands

1. Via the dashboard, you have opened a schedule with status **Plan** or **Published**. A schedule with status **Plan** can be used to roll out both the Cyclical Schedule and shift demands, whereas a schedule with status **Published** can only be used to roll out shift demands.
   Click **ACTIONS** > **Apply cyclical schedule and shift demands**.

   The following **Access Control** permissions are required: 'Apply cyclical schedule & shift demands' and 'Edit Schedules'. Without these permissions, you can't use this feature.

2. Define the **Period**.

> By default the **Period** is the entire period of the currently selected schedule. You can shorten but not extend this period.

3. To include the number of required people on a particular shift and day, select **Shift demands**.
4. To roll out the cyclical schedule, select **Cyclical Schedule**.
   - **Apply on sick leave**
   - **Apply on off-work and leave requests**
   - **Apply on public holidays**
5. Click **APPLY**.
   The shift demands and/or the cyclical schedule are rolled out.

4.11 Change status of a scheduling period

> - It's not possible to view/change the status of a single shift.
> - The system doesn't currently allow for multiple statuses during a scheduling period. However, multiple statuses might be visualized on the Dashboard > "Schedules" on page 13 tile when set like that in the OWS client.
> - A user with the permission **Apply status to part of a schedule period** can set the status of a schedule partially, e.g. only publish/close/approve a part of the schedule.

You can advance the status of a scheduling period - from **Plan** to **Published** to **Closed** to **Approved** - in accordance with the following rules:

- For publishing: The status of the previous schedule should be published or higher (or it is the first schedule)
- For closing: The status of the previous schedule should be closed or higher, there exist no subcontracts in status Concept in the schedule (for more information, see "Subcontracting shifts" on page 50) and the schedule end date is within 7 days from now.
- For approving: The status of the previous schedule should be approved or higher. A schedule cannot be approved while there are open realizations.

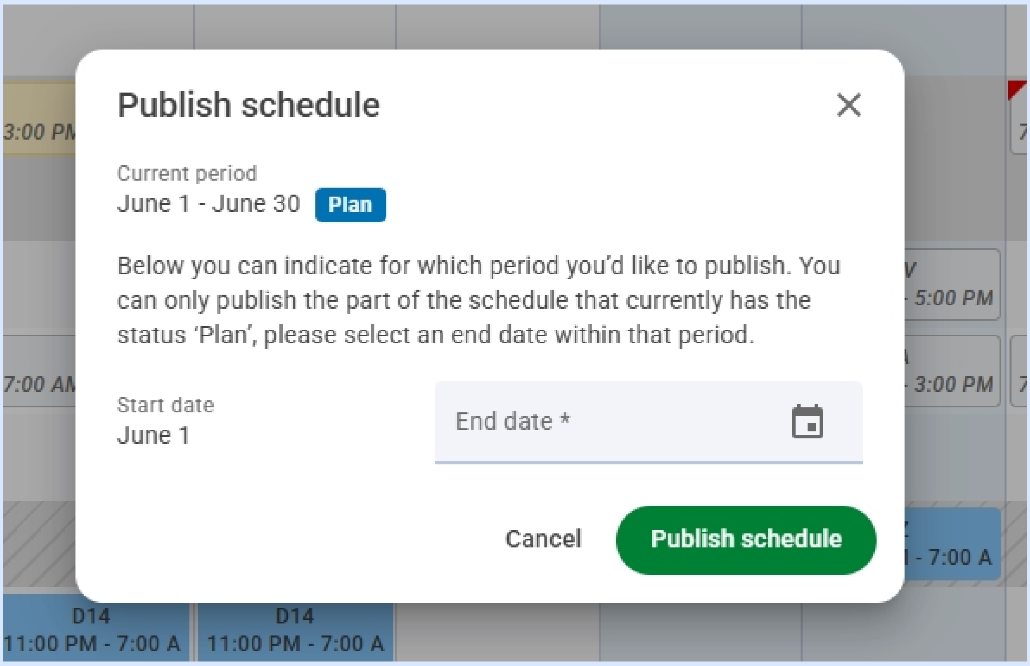
To change the status of a scheduling period:

1. Open the scheduling period in question from the dashboard. The possible status change is displayed at the top of the schedule in the header.

2. Click the action button and confirm. (Optional) Define the period for which you want to change the status.

The status is updated once the action is successfully executed.

Example

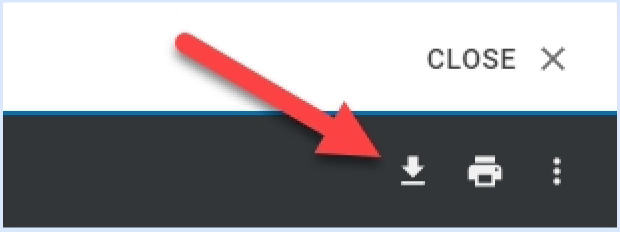


5 Reports

(Optional) Open and download MS reports. Your organization determines which reports are available to you.

1. Select the **Reports** tab.
2. Select one of the available reports.
3. Enter and/or select the details you want to be present in the report. These details are different for each report.
4. Select the **Open report** button.
   - (Optional) Select the arrow next to **Open report** to **Export to Excel**.
5. After the report is generated, you can download it with the **Download** button in the top right corner.

Example



6 Glossary

This glossary defines key terms from the **ORTEC WS for Team Schedulers** application.

6.1 Activity

An activity refers to a specific task, event, or assignment that needs to be scheduled and completed by team members. One or more activities are part of a "Shift" on page 83.

6.2 Cyclical schedule

A cyclical schedule involves rotating patterns of shifts, which can be assigned to individual employees. For example, one week an employee might work mornings, the next week afternoons, and then nights, and it keeps repeating like that.

In order to be used in **Team Schedulers**, these patterns must have been previously defined in the **ORTEC Workforce Scheduling** application. Learn more: "Apply cyclical schedule and shift demands" on page 74

6.3 Dashboard

The dashboard provides an overview of information and highlights areas that need immediate attention, for example, staffing shortages. It helps schedulers to quickly see what needs to be fixed so everything runs smoothly.

6.4 Department

A department is a distinct functional unit or division within an organization. It represents a group of individuals who are scheduled together using the **Team Schedulers** application.

6.5 Optimizer

A mathematical optimization model for automatically assigning shifts. It analyzes various factors such as employee availability, skill levels, and workload demands to come up with the best possible schedule. Instead of manually trying to fit all the pieces together, this tool does it automatically, saving time and ensuring an optimal schedule for everyone involved.

Learn more: "Optimize schedule" on page 72

6.6 Overstaffed

Overstaffed means there are more employees scheduled to work during that time than are actually needed to cover the workload. Having too many employees can be inefficient and costly because you're paying more wages than necessary for the work that needs to be done. So, identifying and adjusting for overstaffing helps optimize resources and manage costs effectively.

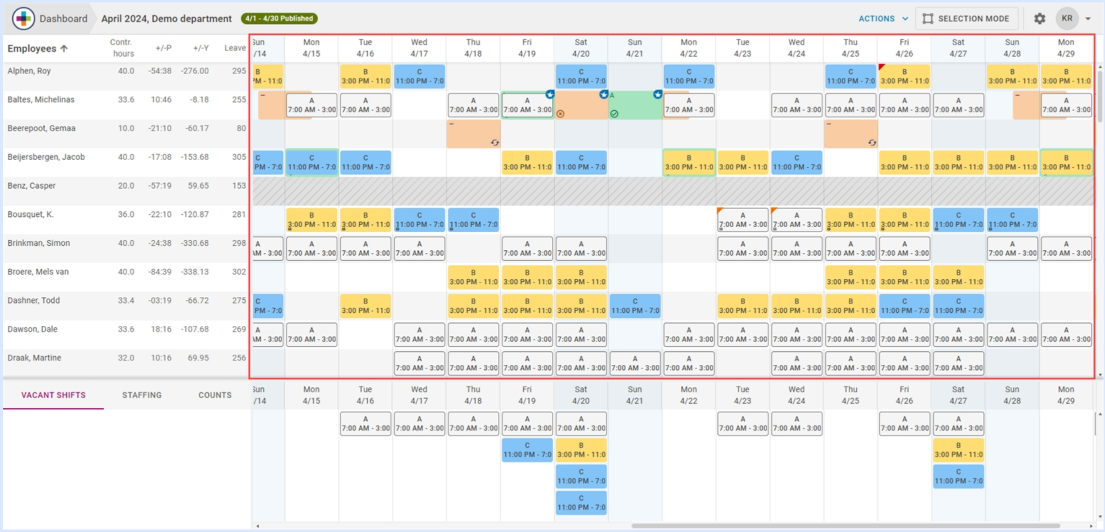
6.7 Period

A period refers to the timeframe set for each distinct schedule. For instance, the period can be set to 4 weeks. During this time, shifts are assigned to employees. This setup helps in planning and organizing work shifts over a defined period. By having a set timeframe, schedulers can create schedules in advance, allowing employees to know their work hours well ahead of time. It also provides a structured framework for managing staffing needs and ensures that scheduling tasks are carried out efficiently within the designated period.

6.8 Planboard

The planboard allows schedulers to create, view, and manage schedules for team members. It provides an intuitive interface for assigning shifts and tracking progress over time. Schedulers can drag and drop vacant shifts on the planboard to make adjustments and allocate resources efficiently. Additionally, the planboard includes a selection mode, an actions menu, color-coding, and a zooming feature to enhance usability. For more information, see "Planboard" on page 23.

Example



6.9 Requests

6.9.1 Swap request

A swap request is a formal submission by an employee to exchange their scheduled shift with another employee's shift. For more information, see "Swap requests" on page 16.

6.9.2 Leave request

A leave request is a formal submission by an employee to request time off from scheduled shifts or activities. For more information, see "Leave requests" on page 20.

6.9.3 Employee scheduling request

An employee scheduling request refers to a formal submission by an employee to request specific shifts or time slots to (not) work. These requests are shown as preferences. For more information, see "View employee preferences" on page 34.

6.10 Schedule

A schedule is a detailed plan or timeline that lays out when each employee is supposed to work, take breaks, or have time off for things like vacation or when they're sick. A schedule can include different types of shifts, like morning or night shifts. Having a clear schedule helps keep things running smoothly and ensures that everyone knows their responsibilities.

6.11 Scheduler or planner

A scheduler or planner is an individual responsible for overseeing and managing schedules. The scheduler creates, modifies, and optimizes schedules according to operational needs and employee availability. They make sure everyone knows their schedule and tasks. They may also handle tasks such as approving leave requests, managing shift swaps, and resolving scheduling conflicts. Overall, the scheduler plays a key role in keeping things running smoothly and making sure everyone's time is used effectively.

6.12 Self scheduling

Self scheduling is a scheduling method that allows employees to have more control over their work schedules, while also maintaining flexibility for the organization. It typically involves the following steps:

1. Employees sign up for the shifts they want to work.
2. Employees adjust the schedule to improve the department schedule and earn points. Employees earn more points by choosing less popular shifts.
3. The planner or manager assigns the remaining vacant shifts among the employees, taking into account the points earned by each employee.

Self scheduling can lead to benefits such as improved work-life balance, higher employee satisfaction, improved employer attractiveness in the job market, increased flexibility, reduced overtime, and reduced employee absenteeism and turnover.

> Though some settings can be adjusted within **Team Schedulers**, self scheduling first needs to be enabled and configured in **ORTEC Workforce Scheduling**. Employees use the **ESS** application to sign up for shifts.

6.13 Shift

A shift is a specific period of time during which employees are assigned to work. A shift consists of at least one "Activity" on page 79.

The effective working time is shown in the shift details, shift edit and employee proposal screens. It contains the sum time of the activities that are considered work in ORTEC WS.

6.14 Shift demand

Shift demand means the amount and type of staff needed for different times during the day. It includes things like expected workload and what skills are needed for each part of the day.

> There must be a demand in ORTEC WS for the corresponding date. Learn more: "Adjust shift demand" on page 65

6.15 Skill

Skills refer to the specific abilities that employees possess and which are needed for the shifts they're assigned to work. For example, in a retail store, someone might be skilled at operating the cash register, while another person is great at helping customers find products. These skills are important because they ensure that each shift is staffed with people who can handle the tasks required during that time. By matching the right skills to the right shifts, schedulers helps ensure that the team can effectively meet the needs of the business.

6.16 Staffing

Staffing is about how many employees are assigned to work at different times. Schedulers use staffing to make sure there are enough people working when needed, while also using resources well and keeping costs down. Staffing is based on things like shift demand, when employees can work, and what skills are needed. This helps create the best schedules possible for everyone involved.

> See also: "Overstaffed" on page 80 and "Understaffed" on page 84

6.17 Status

A schedule goes through different statuses. Each status shows where the schedule is in the process.

- **Plan**: This is the starting point where the schedule is being created or edited by the planner. It's like a draft stage where changes can still be made. Employees are imported from the HR system. During this status, multiple scheduling rounds might be performed.
- **Published**: Once the schedule is finalized and ready for employees to see, it's published. This means it's set and employees can view their assigned shifts. The actually realized hours are recorded.
- **Approved**: Hours have been approved by the planner. Changes aren't possible anymore.
- **Processed**: The hours and the schedule have been reviewed and approved by a manager or supervisor.
- **Closed**: Hours are exported to the payroll. The process is complete.

Though you can't directly approve or process schedules in the Team Schedulers application, backend processes can handle these tasks, and these statuses will be visible.

6.18 Understaffed

Understaffed means there aren't enough employees scheduled to work during a specific time to meet the workload demand. Being understaffed can lead to issues such as longer wait times for customers, decreased productivity, and increased stress for employees who are trying to handle too much work. Identifying and addressing understaffing is important to ensure smooth operations and maintain customer satisfaction.

6.19 Violation

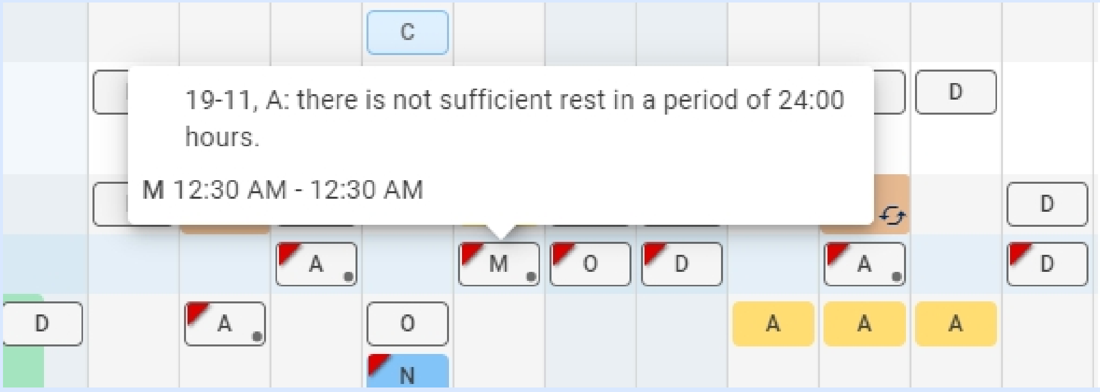
A violation happens when a scheduled shift doesn't follow the rules or limits that have been set. These rules might include things like the most hours someone can work in a row, how long they need to rest between shifts, or what skills are needed for a particular shift. When a violation occurs, schedulers are alerted so they can fix the problem. This helps make sure everyone's following the rules, and it also helps make scheduling run smoothly.

Violations can be recognized in the schedule by a small triangle in the upper-left corner of a shift. Red for labor rule violations, orange for skill violations, and blue for employee scheduling request violations (such as leave requests and shift wishes).

Learn more: "View violations" on page 40

Example

This screenshot shows several shifts with labor rule violations and a sample text of what could be displayed when hovering over such a shift.



Contact information

For further information contact ORTEC, either through your existing ORTEC representative or by using the appropriate contact details listed on www.ortec.com

Our website offers case studies, white papers, brochures, demos and much more.