



ORTEC Workforce Scheduling 7

User Manual Ad Hoc Planning

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1 Overview

ORTEC Ad Hoc Planning enables organizations to respond quickly and efficiently to sudden changes in the work schedule. It uses relevant and current data to suggest the best possible replacement, providing continuity in terms of staffing and service quality.

1.1 Comparisons with other ORTEC apps

- **ORTEC Workforce Scheduling** is a comprehensive scheduling tool with extensive features and configurability.
- **ORTEC WS for Team Schedulers** is used by schedulers to manage shifts.
- **ESS** is used by employees to view their schedule, request leave, indicate availability, swap shifts, and more.
- **ORTEC WS for Managers** or **Manager Self-service (MSS) App** provides managers with an overview of staffing, leave requests, and other administrative tasks.



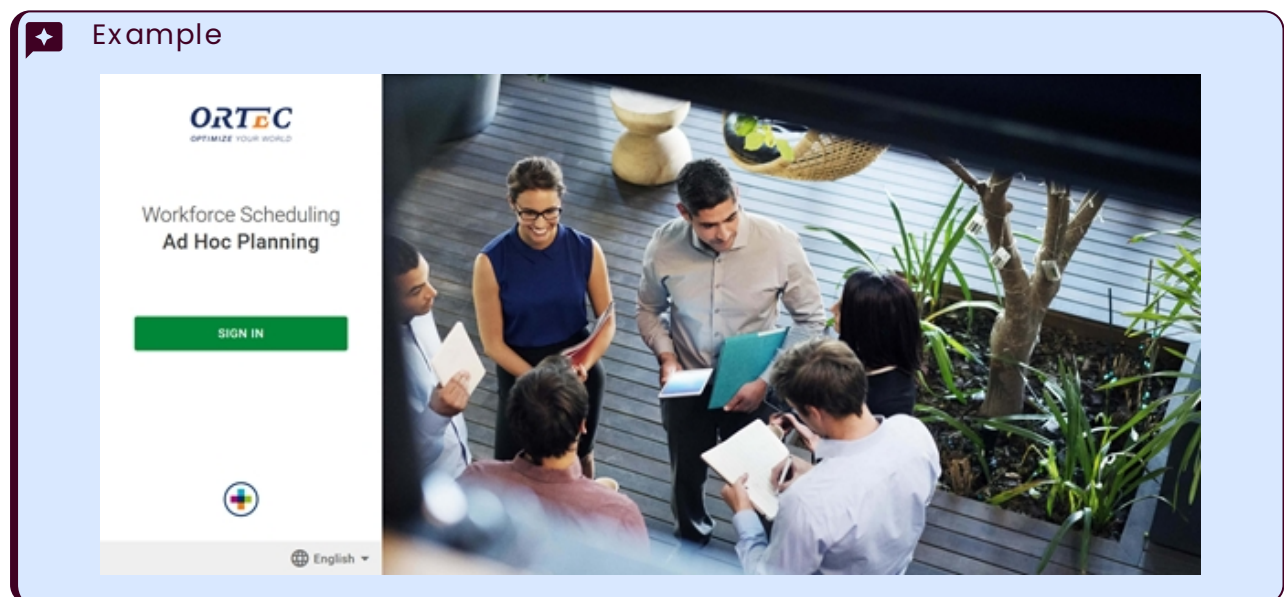
2 Screens and functionalities

This section describes the main screens and functionalities:

2.1 Sign in

The Ad Hoc Planning application is available through provided websites configured for your environment.

The start page of the application will look like the one below and provide you with a sign in option. If configured, you can switch languages on the bottom left of the screen. After clicking on sign in you will be able to enter your credentials in order to access the Ad Hoc Planning of your departments.



2.2 Home screen

After logging on to the application, an overview screen will appear consisting of the following parts:

- **Home button:** Displayed as the ORTEC logo in the upper-left corner and also visible in the schedule view, reverts to the Home screen when clicking on it.
- **User button:** Displayed in the upper-right corner, shows the user that is currently connected, clicking on it will allow you to sign out or to change the language if configured.
- **Department selector:** Displayed on the left-hand side. It is visible when a user has access to multiple departments. Selecting one will open the schedule of that department.
- **List of current staffing issues:** On the right-hand side of the screen, the departments that have issues are listed and ordered by chronological priority. The number next to the red dot shows the amount of issues for the first two days in the schedule. Clicking on a department will open that schedule.
- **Offered shifts:** On the bottom part of the screen, an overview of offered shifts is displayed if this functionality has been activated. In this area the number of staffing issues a planner has offered to the employees is shown as well as the number of offered shifts that have a pending request from employees which the planner can assign at a later stage.

2.3 Schedule overview

Once a schedule with issues is selected, the schedule is opened and will display all the work shifts present.

The screen consists of the following parts:

- **Schedule of the selected department**
The main part of the screen is a view of the schedule spread over several days depending on the size of the screen. Days with issues will be marked in red with the number of issues next to it. It is possible to scroll up to 8 days in the future either by swiping, on a tablet, or by clicking on the arrows on the sides of the screen on a computer.
- **Schedule selector**
On the top left corner, a schedule selector is displayed again if a user has access to more than one department. By clicking on it a list of available schedules is listed in a drop down menu.
- **Home button**
The home button, located on the left of the schedule selector, will take you back to home screen when clicking on it.



- **User button**

As in the home screen, the user button is present and allows you to sign off or change the language.

- **Filters**

On the bottom part of the screen, filters are present where you can filter on shifts that are part of the following three blocks: day, evening or night. The times are configured as follows and each shift will appear in a block when the majority of the time's shift is contained in that block.

Day: 6:00 till 18:00

Evening: 18:00 till 0:00

Night: 0:00 till 6:00

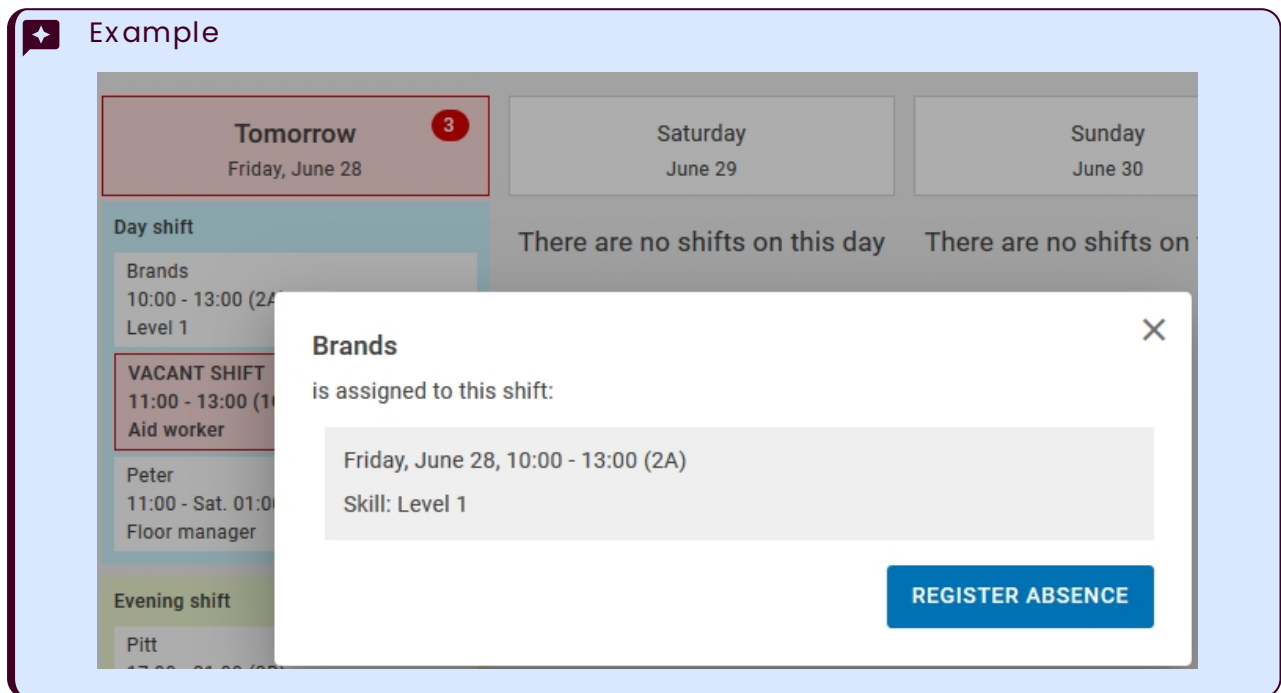
Cells marked with **red dots** in the schedule represent scheduling items that contain issues and will be either shifts that are no longer staffed due to an absence or shifts that were vacant from the start. It is possible to click on any shift and this will give you the option to either enter an absence or to find a replacement depending on the initial situation.

Cells marked with **golden dots** represent shifts that have been offered and which may or may not have been requested by an employee.



3 Absence registration

When clicking on a staffed shift, information about that shift appears, the assigned employee appears and whether a skill is required. From there it is possible to register an absence by clicking on **Register Absence**.



In the following screen, on the left-hand side, information appears about the previous and next shift of the employee and on the right-hand, the possibility to select one or multiple days of absence by clicking on the relevant begin and end date. The remark field below is available to add any relevant comment about the absence which will be helpful for the planner using OWS to trace the absence.



Example

REGISTER ABSENCE FOR BRANDS

CLOSE X

Upcoming shifts for Brands

By registering this employee as absent, the indicated shifts will become staffing issues.

- Today, Thursday, June 27
10:00 - 13:00 (2A)
Department S
- Friday, June 28
10:00 - 13:00 (2A)
Department S
- Tuesday, July 2
23:30 - Wed. 03:00 (4A)
Department S
- Wednesday, July 3
23:30 - Thu. 03:00 (4A)
Department S
- Thursday, July 4
23:30 - Fri. 03:00 (4A)
Department S

Select the period of absence

Select one day, or the first and last day.

THU	FRI	SAT	SUN	MON	TUE	WED	THU
27	28	29	30	1	2	3	4

Remark (optional)

0/200

REGISTER ABSENCE

Once the absence is registered the shift becomes Vacant and can be reselected to remove the absence by clicking on **Remove absence**, in which case the shift will revert to its original situation and delete any entered remark. In case the absence is removed a pop up window will appear explaining that this will also remove the staffing issue.

Example

Peter is ABSENT

X

and can't work this shift:

Friday, June 28, 11:00 - Sat. 01:00 (2C)

Skill: Floor manager

Remark: -

REMOVE ABSENCE

PROPOSE EMPLOYEE

You can also click **Propose Employee** to find a suitable replacement.



4 Employee proposal

When clicking on a vacant shift, a screen opens displaying the shift date, working hours, and skills needed if applicable.

Example

VACANT SHIFT

No employee is assigned to this shift.

Thursday, February 11, 08:00 - 12:00 (4D)
Skill: Floor manager, Skill S

PROPOSE EMPLOYEE

Click the **Propose Employee** button to show the list of available employees.

Example

Thursday, February 11, 08:00 - 12:00 (4D)
Skill: Floor manager, Skill S

Available employees

What does 'Balance' mean?

☐	Joline van Ulen	Skill:	Balance: 0		SHOW SHIFTS
☐	Katy Theo	Skill: Violation:	Balance: 0		SHOW SHIFTS
☐	Samantha Jaylen	Skill: Violation:	Balance: 2,560		SHOW SHIFTS
☐	Katie Olivia	Skill:	Balance: 4,960		SHOW SHIFTS
☐	Lilly Scarlett	Skill:	Balance: 2,880		SHOW SHIFTS

SHOW ALL

ASSIGN SHIFT

The list is sorted on skills, violations and their balance hours. If skills are required for the shift, these will be checked with the available skills of the employees. Furthermore, if more than 5 employees are available the show all button can be



pressed to extend the list. A phone icon shows up when an employee has at least one phone number. When clicked, a detail window opens, showing the phone number(s) of the employee.

Example

Thursday, February 11, 08:00 - 12:00 (4D)

Skill: Floor manager, Skill S

Available employees

What does 'Balance' mean?

☐	Joline van Ulen	Skill:	Balance: 0		HIDE SHIFTS
WeThFrSaSuMoTuWeThFrSaSuMoTuWeThFr					
☐	Samantha Jaylen	Skill: Violation:	Balance: 2,560		SHOW SHIFTS
☐	Katy Theo		Balance: 0		SHOW SHIFTS
☐	Katie Olivia		Balance: 4,960		SHOW SHIFTS
☐	Lilly Scarlett	Skill:	Balance: 2,880		SHOW SHIFTS

[SHOW ALL](#)[ASSIGN SHIFT](#)

Call Katy Theo

0612345678

If the device is configured to make phone calls, the employee will be called when the phone number is clicked.

Employees with overlapping shifts are not shown in the employee proposal.

If options between employee choices need to be weighed, it is possible to view extra planning information about the employees that can serve as a replacement. By clicking on an employee the respective planning will be shown in a timeline below their name to evaluate the choice. A colored legend is displayed on the right-hand side to make it easier to distinguish already planned day, evening or night shifts.



Skill: Floor manager, Skill S

(i) What does 'Balance' mean?

Joline van Ulen	Skill: ✓	Balance: 0		HIDE SHIFTS
We Th Fr Sa Su Mo Tu We Th Fr Sa Su Mo Tu We Th Fr				
Samantha Jaylen	Skill: ✓	Violation: show !	Balance: 2,560	SHOW SHIFTS
Katy Theo	Skill: ✓	Violation: show !	Balance: 0	SHOW SHIFTS
Katie Olivia	Skill: ✗	Balance: 4,960		SHOW SHIFTS
Lilly Scarlett	Skill: ✗	Balance: 2,880		SHOW SHIFTS

ASSIGN SHIFT

Assign Shift button to assign

5 Shift offering

In the Ad Hoc Planning, if the offering shift functionality is activated, it is possible to offer shifts to eligible employees so they can request them if they wish. In this manner, employees can solve understaffing issues by themselves.

Once shifts are offered, employees will receive a notification and can request the shift.

The planner then receives these requests and only needs to assign the shift. In case multiple employees have requested the same shift, the planner can evaluate the requests first and assign the shift to the most appropriate employee.

In this section you will find information about the processes involved in:

5.1 Offering shifts

When the shift offering functionality is active, shifts can also be offered to employees which is done in the following manner:

- In the schedule screen select a vacant or absent shift.
- A pop-up screen opens and displays the details of the shift as well as the option to click on **Offer shift**.
- Once the button has been selected a screen opens where the following shift items can be modified if needed:
 - Shift begin time
 - Shift end time
 - Removal of skill (if applicable)
 - Lowering of skill level (if applicable)
- From here it is possible to either **Cancel** the action or to click on **Offer shift** in which case the shift is sent to all eligible employees which can be accessed through the ORTEC WS for Employee web and mobile app applications. In both cases, the application reverts to the schedule screen after a choice is made.



- Only shifts in the future can be offered.
- Notifications aren't sent to employees with an absence, illness, or an approved leave request during the period of the offered shift.



- In the schedule screen, the vacant or absent shift is transformed into an offered shift and on the header of the shift's date the red dot symbolizing the planning issue is transformed in a gold colored dot to highlight there is an attempt underway to solve the planning issue.
- Finally, on the home screen, the number of staffing issues is reduced and in the **Offered shifts** area the status bar showing the number of staffing issues that are currently offered is increased.

5.2 Assigning shifts

Once offered shifts have been requested by employees, the planner can choose to assign shifts.

The process is as follows:

- Employees receive a notification that they can pick the shift and can do so by selecting the option Request shift.
- Once a request is entered a message is sent out to the planner that an offered shift has been requested which can be seen in:
 - The **Overview screen**: in the Staffing issues area, the number of requests is shown compared to the number of offers and in the Offered shifts area, on the bottom status bar, the number of offered shifts that are ready to be assigned will have increased.
 - The **Schedule screen**: underneath the offered shift a number will appear to inform the planner how many requests have been received.
- From here the planner can start the assignment process, this can be done from either the **Overview** or **Schedule screen**.

Shift assignment via the **Overview screen**:

- By selecting the offered shifts ready to be assigned section, the planner is directed to a new screen containing two tabs: the All shifts tab shows an overview of all the offered shifts including the ones that have not received requests whereas the Requested shifts tab only shows the offered shifts containing requests.
- By clicking on any of the offered shifts a new screen is displayed which shows details about who the offered shifts have been sent to and when it was sent and, if applicable, which employee has entered a request for it.
- If a request has been entered, the planner can click on the employee's name and details about the employee and possible impact on the schedule is shown. These details include:
 - The employee's contract hours, function and skills.
 - The employee's current remaining hours balance if this shift is assigned.



- Any violations that would result from this shift assignment.



At this moment only a specific set of violations are checked, refer to ["Unsupported functionalities and remarks" on page 16](#) for an overview of the violations that are checked.

Shift assignment via the **Schedule screen**:

- By selecting an offered shift from the schedule screen, a new window opens showing the date and time the shift was offered as well as a summary of the shift.
- By clicking on the **See details** button the same screen described in the second bullet of the Shift assignment via the overview screen, and from there the assignment process is identical.
- Once an offered shift is assigned the **Offered** marking on the shift in the schedule disappears and the number of issues on the schedule header of that day decreases as well.
- On the **Home screen**, the number of issues also decreases in the **Staffing issues** area as well as in **Offered shifts** area.



If an offered shift is not assigned before the start of the shift it will be labeled as 'Failed to fill before end of shift' in the Finished offers section of the Ad Hoc Planning. See section ["Reviewing finished offers" on page 12](#).

5.3 Reviewing finished offers

Offers are considered finished when they have either been assigned or if they become outdated while remaining unassigned. On the Overview screen, an option is provided to access this data by pressing **Finished offers**. This will open an overview of these shifts assigned or ranging between 7 days prior and after today's date.



6 Integration with ORTEC WS

In this section you will find additional information about the integration of the Ad Hoc Planning and ORTEC WS Server.

6.1 Visibility of (un)assigned shifts

Only work related shifts are visible in the Ad Hoc Planning Application. If the shift is assigned to an employee the **employee name** will be displayed in the Ad Hoc Planning schedule. Unassigned shifts and which have not been offered will be shown as **Vacant**.

If a shift contains at least 1 minute of a work activity, the shift will be shown in the Ad Hoc Planning schedule. If a non-work activity is positioned at the beginning or end of a shift, it won't be shown as part of the shift in the schedule. However, if the non-work activity is positioned between two work activities, it will be shown.



Example

A shift contains the following activities:

9:00 to 12:00: work
12:00 to 12:30: break
12:30 to 15:30: work
16:30 to 16:30: leave

The shift will be shown in the Ad Hoc Planning schedule from 9:00 to **15:30**.

Shifts assigned in the Ad Hoc Planning via the ["Assigning shifts" on page 11](#) process will also be shown as planned in the Windows Client.

Deleting an assigned shift in either the Ad Hoc Planning or the Windows Client will result in a deletion of the shift in both applications.

6.2 Visibility of registered absences

A registered absence in the Ad Hoc Planning application is shown in the OWS schedule as a background color for the days that the absence is added for the corresponding employee. This background color is shown in every schedule that



the employee is linked to (all contracts and availabilities for departments and if the employee is lent or borrowed from or to other departments). Also, the remark of the absence is shown in the hint text.

The shift of the absent employee is still available in OWS, because this information is needed for replacement by illness or leave etc.

An absence removed from the Ad Hoc Planning is also removed from the Windows Client.

6.3 Visibility of offered shifts

Shifts that have been offered in the Ad Hoc Planning will be shown as 'Open for bidding' in the Windows Client and vice versa. The latter is only shown when the shift date falls within the range of 8 days from now.

Deleting a shift that has been marked as 'Open for bidding' in the Windows Client will also remove it from the Ad Hoc Planning.

6.4 Copy of absent employee shift

If the shift of the absent employee is assigned to someone else in the Ad Hoc Planning application, a copy of the shift is created in ORTEC WS.

The copied shift is assigned to the absent employee and the original shift is assigned to the other employee. The copied shift is set to status 'fixed' and a shift remark is added that it is a copied shift.

This action is helpful for traceability purposes.

Scenarios

- If the copied shift is unfixed and reassigned to another employee, then this shift isn't shown in the Ad Hoc Planning application. The planner can recognize this shift by the automatically added remark.
- If the copied shift is unfixed and unassigned as vacant shift, then this shift is now shown in the Ad Hoc Planning application as vacant shift.

6.5 Employee proposal functionality

In the Ad Hoc Planning, employees can be made available in the employee proposal in order to solve a vacancy issue. Only employees who meet the following



criteria will be shown:

- The employee has weekly hours for department.
- The employee has been borrowed from another department.
- The employee has no overlapping illnesses.
- There are no overlapping approved leave requests.
- There are no planned shifts that overlap with the to be assigned shift.

The hour balance of an employee shown in the proposal screen is linked to the configured running account. The number of hours shown is limited to:

- The scheduling period in which you are working.
- The contract of the employee, if an employee has multiple contracts in the department, he is shown twice in the proposal screen with both different calculations for that specific contract.
- The department of the current schedule, if an employee has also calculated hours in that period for other departments, these hours are not taken into account.



7 Unsupported functionalities and remarks

7.1 Unsupported functionalities

The Ad Hoc Planning currently doesn't support the following functionalities:

Category	Functionality
Schedule	Add a shift to an employee
Schedule	Remove a shift from an employee
Schedule	Make a shift longer or shorter
Schedule	Change time category in colors
Schedule	Change time category in begin- and end times
Schedule	Add a time category
Schedule	Show lent-in employees in a different way in the schedule
Schedule	Possibility to remark a vacant shift or shift of absent employee as not required so it is no staffing issue anymore
Schedule	Remove a vacant shift
Schedule	Show, add or edit shift remarks
Schedule	Sort or filter shifts other than time categories
Absence	Change an existing absence or change the remark of an existing absence
Absence	Add an absence for an employee that doesn't have an assigned shift
Proposal	Set a vacant shift open for bidding
Proposal	Subcontract shift to flexpool or other department
Proposal	Show balance based on a different period than scheduling period
Proposal	Show employees with shifts that overlaps with the assigned shift
Proposal	Take preferences to work/not to work into account

7.2 Remarks

Below a number of important remarks that need to be considered when using the application:

- Vacant subcontracted shifts from other departments are not shown as vacant shifts.
- Skills for workstation locations linked to employees aren't taken into account in the employee proposal functionality. It is only checked if an employee has the skill and the shift requires the skill.
- The employee proposal doesn't take skill levels into account. Skill levels aren't shown in the shift details either. The shift offering functionality does take the skill levels into account.



- Violations on wishes and other non-ATW related violations like preferred department, collaboration with colleagues aren't checked in the proposal. Only violations are checked that are available in the library of the violation checker.



In consultation with ORTEC, specific ATW rules can be added to this library for your company.

- Skill requirements of activities is taken into account for the whole shift, also for non-work activities.
- For browsers Edge and Mozilla Firefox on a tablet, scroll snapping is not supported. This means that the scrolling does not continue to a full day if the user stops scrolling through the schedule.
- Changing begin and or end times of unassigned offered shifts in the Windows Client aren't updated in the shift offering overview.
- Changing begin and or end times of assigned offered shifts in the Windows Client are updated in the Ad Hoc Planning schedule.
- If a shift has already started and is offered, the employee will get a notification but the shift will not be visible in ORTEC WS for Employees or in the ESS Mobile App.
- Employees can (inadvertently) add multiple requests for one shift in ORTEC WS for Employees. In that case, multiple requests will be shown for that shift for the same employee in the 'requested by' overview in Ad Hoc Planning.
- Offering a shift that starts or ends with a non-work related activity like pause or leave will create an error. This is also the case if the begin- or end time of a shift is changed in such a way that the begin or end time starts or ends with a non-work related activity. Furthermore, since in the Ad Hoc Planning only work related shifts are shown any non-work related activity will be filtered out when viewing the shift in the schedule.
- When offering a shift, it is possible to lower the skill levels of a shift. If the minimum skill level is 1 now, skill level 0 is also shown. When choosing this skill level, an error occurs because level 0 is not possible because the minimum level is 1.
- When assigning a shift open for bidding directly in the Windows Client to someone who did not request the shift, this offer is shown in Ad Hoc Planning as finished offer, but with the text that 'no one is assigned to the shift'. The employee in question will also not receive a notification that the shift is assigned to him, however, in the schedule in Ad Hoc Planning, it is shown that this employee is assigned to the shift and no offered shift is shown anymore.
- When the checkmark of a shift open for bidding is in the Windows Client is removed, the shift still maintain the status 'offered' in the Ad Hoc Planning.
- When changing the proposal departments in the Windows Client, the users related to these departments are not updated directly in the integration service of shift offering. In order to do so, a data element of the related employees should be changed (for example by adding a space to the first name, and directly remove the change afterwards).



- When the general setting DoNotDeleteUnnecessaryShifts is switched off, shifts do not become vacant in the Ad Hoc Planning if they are overstaffed. If an absence is created the shift is offered, a copy of the shift is assigned to the absent employee in the Windows Client and this shift will create an additional demand resulting in overstaffing if the planned shift is equal to the demand for that day. The notification triggered when offering the shift will result in a crash in the ESS app when it is selected and errors in Ad Hoc Planning.
- In Ad Hoc Planning, a shift cannot be longer than 24 hours and such shifts will be filtered out from the schedule.



8 Job stories

The following stories describe a number of situations for which the Ad Hoc Planning provides a solution:

#	Category	Job story
1	Start of the day	When I start my work day, I would like to know as soon as possible if there are any urgent problems with the staffing today or tomorrow, so I can solve these problems as quickly as possible and maintain our required service level.
2	Staffing	When there is a vacant shift for any reason, I want to be able to see if a shift is understaffed, so I can decide that a replacement is needed for this shift.
3	Schedule	When I start my working day, I want to see which employees are working today so I know who I can expect or undertake action if someone is not arrived.
4	Schedule	When I look at the schedule I want to see which employees are working in the day, evening or night, so I can easily have an overview on this.
5	Schedule	When I look at the schedule I want to see which shifts with which skills are assigned to which employees, so I can easily have an overview on this.
6	Staffing	When there is a vacant shift, I want to check what employees are working on that day so I can decide if it is a problem to have this vacant shift.
7	Staffing	When there is a vacant shift, I want to see what skill is linked to this shift so I can determine if we have a problem that day.
8	Absence	When I am notified of an absent employee that would have worked today or tomorrow, I want to register the absence for the expected period, so the absence is known to others and a replacement can be found, if necessary.
9	Absence	When I start my shift, I want to know if there is an urgent problem with the staffing of today or tomorrow, due to an absent employee and find a replacement employee as soon as possible, so our required service level is maintained.
10	Proposal	When there is a vacant shift and I know this is a problem, I want to have a proposal for this shift for an available employee.
11	Proposal	When I want to have a proposal for a vacant shift, I only want to see available employees so I won't assign a shift to someone who is ill or on vacation.
12	Proposal	When I want to have a proposal for a vacant shift, I want to sort on available skill, violations and remaining working hours so I assign the most preferable employee to this shift.
13	Proposal	When I got notified (external from the application) that someone is not available, I want to find a replacement so the required service level is maintained.
14	Proposal	When I search for a replacement and nobody is available for replacement, I want to see this in the schedule so I can search for replacement later.
15	Shift offering	When I log into the Mobile Ad Hoc Planning I want to have an overview of offered shifts, sorted by shift date so I can instantly see the most urgent shift offerings and act on them in order to attempt to solve the staffing issue.
16	Shift offering	When I've registered a sickness, I want to see which shifts are vacant so I can determine if I should offer these shifts to other employees.
17	Shift offering	When I am about to offer a shift I want to be able to adapt it if necessary in order to make it compatible with my available employees.
18	Shift offering	When there is a vacant shift for any reason, I want to be able to offer it to other employees so they can indicate if they want to work this shift.
19	Shift offering	When I have offered shifts to employees, I want to see who requested to work that shift so I can assign it to the most appropriate employee.
20	Shift	When I have selected the most appropriate employee I want to assign the vacant shift to



#	Category	Job story
	offering	that employee and solve the vacancy issue.
21	Shift offering	When I am reviewing the responses to the offered shifts I want to see the violations details in case the shift assignment would generate any in order to make well informed decisions.
22	Shift offering	When I have or get a question about an offering, assignment or request for a vacant shift I want to consult the information needed to answer those questions.



●●○ 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.