

ORTEC Workforce Scheduling 7

User Manual Manager Self-service

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ORTEC

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1 Overview

ORTEC Workforce Scheduling for Managers or **Manager Self-Service (MSS)** app is a web application that allows managers to view and manage their team's schedule online. It's designed for managers who supervise a small number of teams, up to a maximum of 250 employees distributed over a maximum of 50 departments. The web application provides the following functionality:

- View team schedule online
- Monitor under- and overstaffing in departments
- Approve or decline leave requests
- Check employee sickness
- Approve or decline employee actuals
- Approve schedules
- Check labor rule violations
- Add or remove reports or insights based on accounts

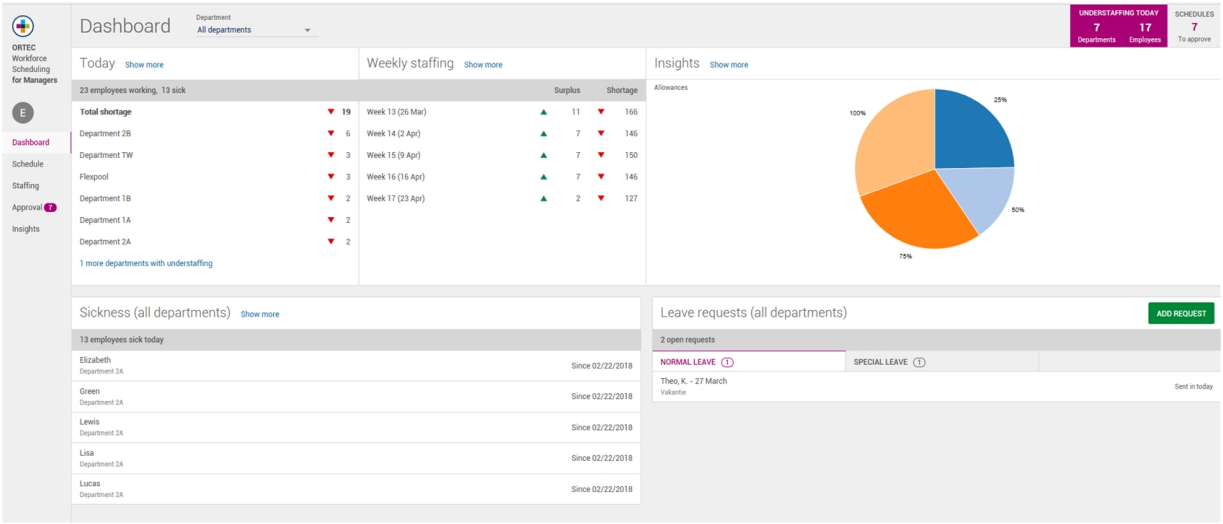
1.1 Comparisons with other ORTEC apps

- **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.
- **Ad Hoc Planning** is designed to solve on-the-fly scheduling issues around the execution day and is optimized for quick use on tablets. It focuses on immediate problem-solving.

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2 Dashboard

This dashboard shows basic daily information. With the department filter you can choose for which department you want to see the information in your dashboard.



2.1 Staffing

In the today section, you see the shortage of employees today. In the weekly staffing section, you can will see the surpluses and shortages in the current week.

2.2 Insights

In the insights section, a graph presents information about the employees. Which graph is shown depends on the application's configuration. The graph presented first on the Insight page, will also be visible in the dashboard. Therefore, if no graph is shown, you can add a graph on the Insight page. See "Insights" on page 7.

2.3 Sickness

In this section, you can see which employees are sick today.

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2.4 Leave requests

Both leave requests and special leave requests can be added, approved or declined in ORTEC Workforce Scheduling for Managers. The application signals approving a request will lead to understaffing. This way you have sufficient information to approve or decline a (special) leave request.

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3 Schedule

The schedule in ORTEC WS for Managers shows the schedules of your departments on a weekly basis. The scheduled shifts with the earliest start time will be presented on top in the schedule. With red and green remarks, the surpluses and shortages of shifts are shown in the schedule. Shifts without demand are shown without as (one-time) shifts in the schedule.

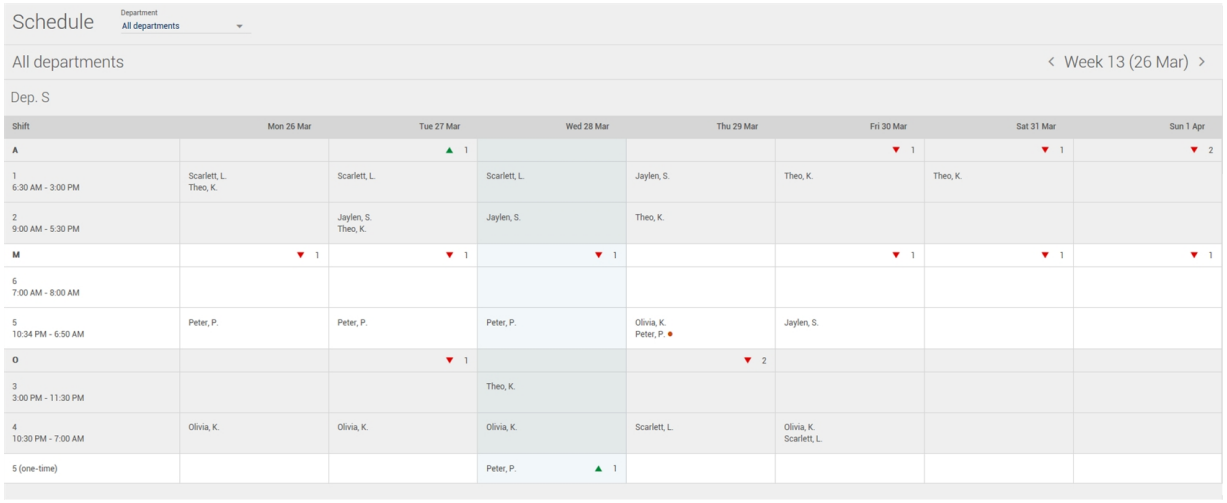
3.1 Special shifts

All non-work related shifts are shown in the special shifts section in the lower part of the schedule.

3.2 Grouping of shifts by type or name

If shifts are grouped, in for example morning, day, evening and night shifts, these groups are shown in the schedule by default. Also, the surpluses and shortages of shifts are shown per group instead of per individual shifts. If you want to group the shifts by name, you can change this in "Settings" on page 8.

> Categorizing shifts in groups need to be done by the application manager. Contact your application manager if you want to group your shifts in **Schedule**.



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4 Staffing

The staffing page shows the staffing of your departments on a weekly basis. Dependent of the selection of one department or all departments, the relevant information of staffing surplus or shortage is shown per day.

4.1 Grouping of shifts by type or name

Also in the staffing page, demand is grouped if this is configured. In this case, the surpluses and shortages of shifts are shown per group instead of individual shifts. If you want to group the shifts by name, you can change this in "Settings" on page 8.

Contact your application manager if you want to group your shifts in **Staffing**

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5 Approval

The approval page is used to approve schedules of your departments. Dependent of your organization's configuration, it is also possible to approve or decline changes in shifts of employees. Approving actuals is possible in department periods with status published, closed, approved or processed. Approving a schedule is possible if it has status *closed*. After approving, the status of the schedule is changed to *approved*. In the table below it is shown in which status of the schedule you can approve the schedule period or actuals of shifts:

Schedule status	Approve schedule periods	Approve actuals of shifts
Planning	No	No
Published	No	Yes
Closed	Yes	Yes
Approved	No	Yes
Processed	No	Yes

- The way approval of schedules and actuals is used, is dependent of your organization's configuration.
- Using more than 200 departments per user isn't supported, and as a result, approving schedules won't be possible in this situation.

5.1 Violations

When approving schedules you can also check the labor rule violations. This gives you insight into the number of violations and the type of violations entered by the planner.

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6 Insights

In the **Insights** page, reports and graphs are available. It is possible to check information for a certain department or to check information for multiple departments together. The graph that is shown as first in this page, is also shown in the **Dashboard**. Possible graph types are a bar chart, line chart or pie diagram.

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7 Settings

By clicking your initials of your login name, you can sign out or change settings. In the setting page it is possible to change your password, language, staffing grouping and it is possible to reset the (insight) page.

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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

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