

ORTEC Workforce Scheduling 7

User Manual Module Flexpool

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ORTEC

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1 Flexpool

One way of dealing with temporary capacity shortages, such as during holidays, sick leave, or workload peaks, is to work with a pool of personnel who can be deployed on a flexible basis. Ordinarily, the establishment, administration, and organization of such a system are complex. However, with ORTEC Workforce Scheduling Flexpool, managing a flexible workforce is straightforward. The deployment of flex-workers is fully integrated into the staff scheduling system and supported by the message structure in ORTEC Workforce Scheduling.

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2 General approach

The staff schedules and the message window form the focal points for management of the entire process.

2.1 Role differentiation

The process of subcontracting a shift involves two distinct roles:

- The planner whose department has a temporary capacity problem, which he/she resolves by subcontracting shifts to the Flexpool agency.
- The planner or manager of the Flexpool agency, who deploys the flex-workers to cover the shifts subcontracted by the department with the capacity problem. If none of the Flexpool agency's own personnel can take on the shift, the Flexpool planner can subcontract the shift to an external staff agency or find available employees in other departments of the organization. Under such circumstances, the Flexpool acts as a central coordination point for the hiring of temporary personnel from outside.

2.2 Process description

1. A departmental planner finds that a shift cannot be covered by the department's own personnel. The planner asks the Flexpool agency to take responsibility for the shift.
2. The Flexpool agency may accept or refuse this request. If the Flexpool agency accepts the shift, it may be assigned to one of the agency's own flex-workers. Under such circumstances, the Flexpool planner plans the shift on the agency's staff schedule in the usual way.
3. If the Flexpool agency is unable to assign an accepted shift to one of the agency's own flex-workers, the Flexpool agency will need to subcontract the shift to an external staff agency or look for other available employees within the organization to cover the shift.

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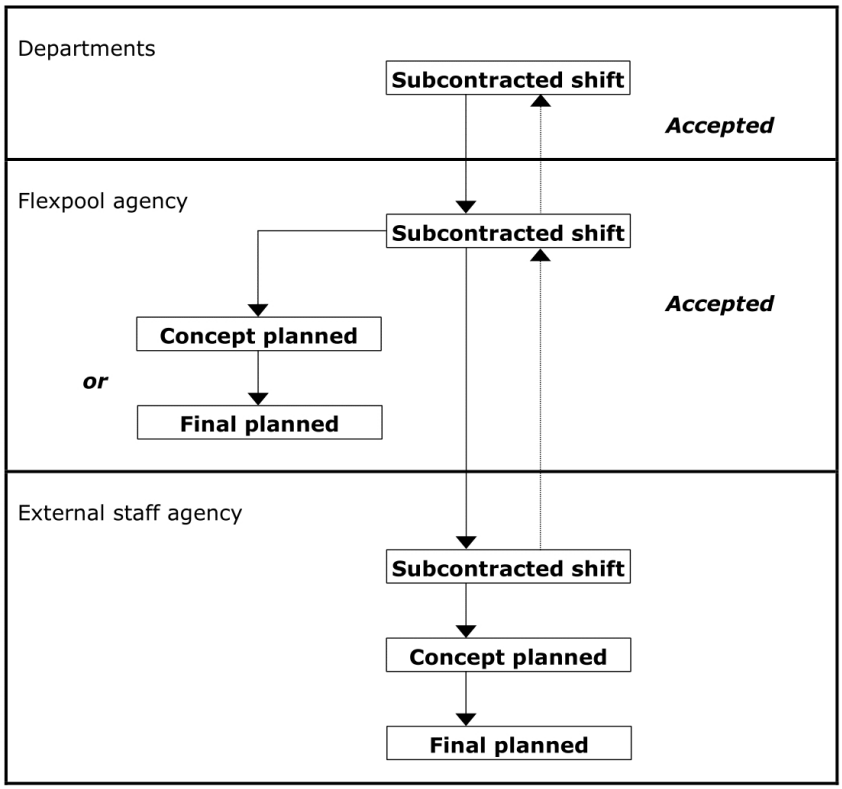


Figure 2.1: Flowchart of shift subcontracting and acceptance process.

In order to distinguish between the deployment of internal flex-workers and external staff agency personnel, both a department called 'Flexpool Agency' and a fictional department called 'External Staff Agency' can be defined within ORTEC Workforce Scheduling. The fictional department's schedules include only those shifts that are subcontracted to real-life external staff agencies.

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3 Create flexpool department

In Access Control, a user with admin rights has created a separate role for subcontracting to make sure that not everybody can subcontract shifts to the Flexpool.

Make sure the FlexPool module is activated, and the global settings 'UseFlexPool' and 'PreferedEmployeeHCrit' are turned on.

1. Open the ORTEC WS client.
2. Create a new department, for example called 'FlexPool' or 'External agency'.
3. On the tab, select the checkbox **FlexPool**.
4. Add employees to the flexpool department. You can also assign existing employees to the new Flexpool department.

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4 Communication

Once a departmental planner has asked for a shift to be contracted out, he or she is contacted by the Flexpool agency or the external staff agency regarding the status of the request. The request may be accepted or refused. All responses to requests made by a departmental planner are displayed on the message window. Once the contracting out of a shift has been agreed, the shift is immediately shown on the staff schedule as being covered.

4.1 Message window (general)

The message window is where messages regarding the status of requests that you have sent or received are displayed. If you are the planner for the Flexpool agency/External staff agency, the message window is also used to accept or refuse requests.

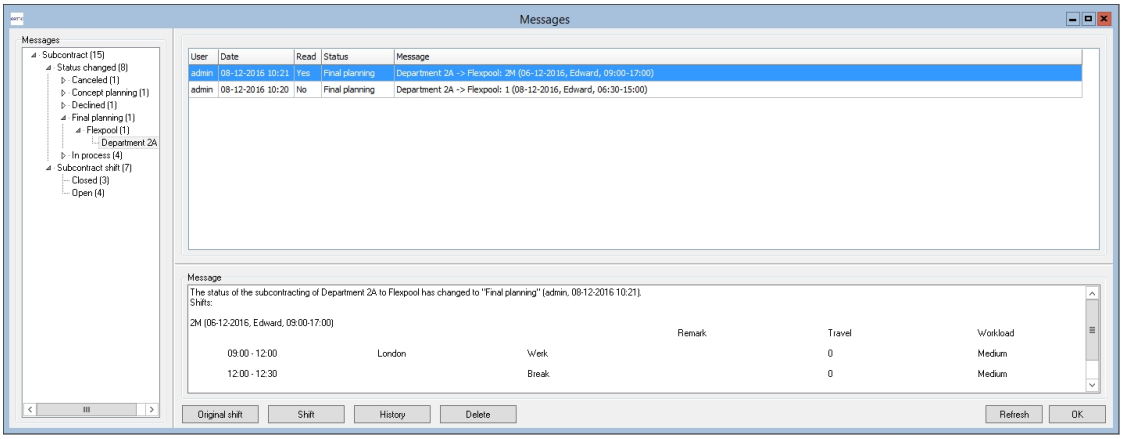
Make sure each planner is subscribed to the relevant messages.

Procedure: using the message window

1. Select 'General' from the menu bar and select 'Messages'.

   - Alternatively: double-click on the status bar message icon , in the bottom right-hand corner of the window.

     The message icon is displayed only if you have new (not read) messages.



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A departmental planner's message window only has the subcategory ‘Status changed’.

In the left-hand part of the window, the message categories are shown. All messages relating to the contracting out of shifts are grouped under the general category ‘Subcontract’.

2. Click on the category ‘Subcontract’.

   In the upper right-hand part of the window, you'll see a list of all the messages, indicating the status of each. Within the ‘Subcontract’ category, messages are divided into subcategories and grouped by status (i.e. not read / read).

   The ‘Subcontract’ category consists of the following subcategories:

   - Status changed
     - Canceled
     - Concept planning
     - Declined
     - Final planning
     - In process
   - Subcontract shift
     - Open
     - Closed

   A departmental planner’s message window only has the subcategory ‘Status changed’.

   The categories under 'Status changed' can be further grouped by the involved departments.

3. Click on the arrow by the category ‘Subcontract’.

4. Click on the arrow by a subcategory.

5. Click on a status to view the messages with that status.
   In the upper right-hand part of the window, you'll see a list of messages of the selected status.

6. If you click on one of the message lines, the full text of the message will appear in the lower right-hand part of the window.

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You can leave the message window open while you are scheduling. However, any new messages that arrive or changes that you make while it is open will not be displayed unless you click on the 'Refresh' button.

4.2 Grouping of messages

As indicated above, messages related to subcontracting may be divided into up to five subcategories. Within the subcategories, the messages are often also grouped by status read/not read and the involved departments.

Thus, the message category 'Subcontract' is divided up as follows:

Status changed (all requests whose status has changed):
[Canceled (#)]
[Concept planning (#)]
[Declined (#)]
[Final planning (#)]
[In process (#)]

Subcontract shift:
[Open (#)]
[Closed (#)]

In general, the number (#) indicates the number of unread messages. The number (#) after the status heading 'Open' under the subcategory 'Subcontract shift' indicates the number of messages for which you have yet to take any action.

Once you have dealt with a message, its status changes and it is accordingly transferred to another group. Which new group it goes to depends on how you decide to deal with it.

4.3 Dealing with messages

Once you have seen an incoming message, you can mark it as read. Its status then changes and it is moved to the appropriate group. As a planner for the Flexpool Agency/External Staff Agency, you also receive messages that require a response – acceptance or refusal.

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Procedure: marking a message as read

1. Select ‘General’ from the menu bar and select ‘Messages’.
   - Alternatively: Double-click on the status bar message icon , in the bottom right-hand corner of the window.
2. If necessary, click on the ‘Refresh’ button.
3. Within the appropriate subcategory, select the status ‘Not read’.
4. Click on a message to display the full text.
5. Next, right-click on the message in question to change its status to ‘Read’.

The message is then moved to the ‘Read’ status group.

Procedure: accepting or refusing a request

1. Select ‘General’ from the menu bar and select ‘Messages’.
   - Alternatively: Double-click on the status bar message icon , in the bottom right-hand corner of the window.
2. If necessary, click on the ‘Refresh’ button.
3. Within the subcategory ‘Subcontract shift’, select the status ‘Open’ and click on a message to display the full text.
4. Next, right-click on the message in question.
5. Select ‘Accept’ or ‘Decline’.

   Depending on the action you took, the message stays in the ‘Open’ subcategory or is moved to the ‘Closed’ subcategory. If you accept the subcontract shift the messages stays in the ‘Open’ subcategory and stays there as long as the subcontracted shift has status ‘In process’ or ‘Concept planning’. If you decline the subcontracted shift the message is moved to the ‘Closed’ subcategory.

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5 Subcontracting a shift – complete process description

The options for subcontracting a shift are described below. The process is described first from the departmental planner's perspective, then from the Flexpool/External Agency planner's perspective.

5.1 Subcontracting: departmental perspective

In your role as departmental planner, you find that the department does not have enough available capacity to cover a particular shift. You therefore decide that you would like to subcontract the shift to the Flexpool.

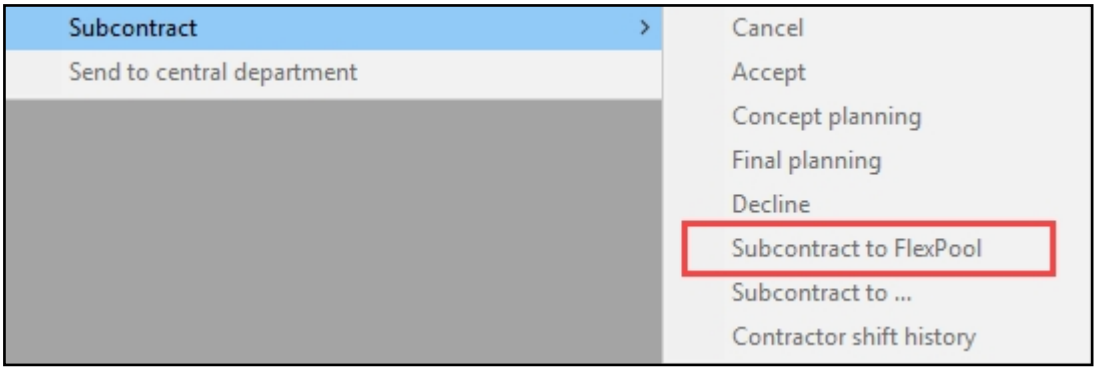
Procedure: subcontracting a shift to the Flexpool

> You need to have the relevant staff schedule open, with the shift you want to subcontract in the 'Vacant Shifts' frame at the bottom of the plan board.

1. Right-click on the shift you want to contract out.
2. Select **Subcontract** > **Subcontract to FlexPool**.

> Only flexpool departments are visible in this menu. For more information, see "Create flexpool department" on page 4. To learn more about subcontracting to other departments, see "Subcontracting to other departments" on page 28.

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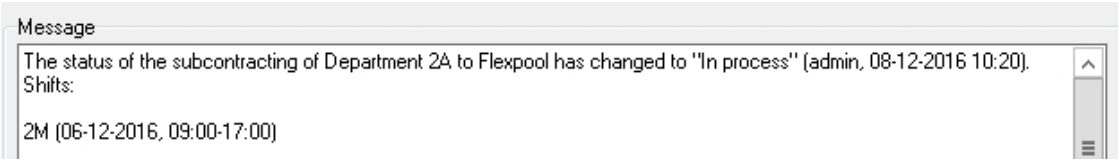
3. The subcontract shift dialog appears where you can select preferred employees and add other preferences to the subcontracted shift.

   The shift is now locked and displayed in italic. The pop-up text that appears if you move the mouse cursor over it reads ‘Contracted out to FlexPool’ with status 'open'.

   The Flexpool planner receives a message regarding your contracting-out request. He or she may accept or refuse your request. The shift will now also be listed on Flexpool schedule, in the ‘Vacant shifts’ frame at the bottom of the plan board.

   To make the subcontracted shift more recognizable, you can give it a different color. Open the . Add a new 'Subcontract shifts pattern' rule, for example for the **Planning board** > **Left corner color**.

   As soon as the Flexpool accepts your request or schedules the shift, you will be sent a message saying that your request is in process. This message will appear in the ‘Status changed’ subcategory on your message window.



> As long as the Flexpool planner has yet to accept a shift that you have asked to subcontract, you can cancel your request at any time.

Procedure: canceling a request to contract out a shift

1. On the plan board, right-click on the shift you have asked to subcontract.
2. Select ‘Subcontract’ from the menu that appears.
3. Select ‘Cancel’.

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The Flexpool will be sent a cancellation message.

5.2 Subcontracting: Flexpool perspective

In your role as Flexpool planner, you receive a message indicating that a departmental planner wants to subcontract a shift. To alert you to the arrival of the message, the message icon  is displayed on the status bar, in the bottom of the main application window.

If you decide to accept the request and assign or subcontract the shift, there are two ways of going about it: you can deal with the matter from the message window or from the plan board. If you schedule the shift from the plan board, the request is automatically treated as accepted.

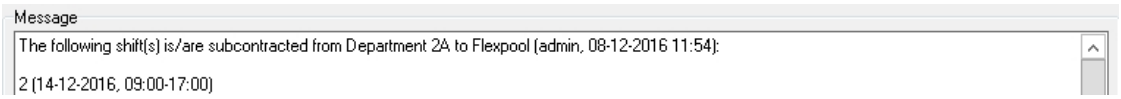
Note: Accepting a request via the plan board saves you time, because you are doing two things at once (scheduling the shift and confirming acceptance).

Procedure: accepting a request via the message window

1. Double-click on the message icon .
2. If necessary, click on the 'Refresh' button to display new messages.

   The subcontracting request can be found in the 'Open' status group of the subcategory 'Subcontract shift'.

3. If necessary, click on the message, so that the full text is displayed in the bottom right-hand part of the window.



4. Right-click on the message line in the top right-hand part of the window.
5. Select 'Accept'.

   The message will be moved to the 'In process' status group.

   Naturally, you still need to go to the plan board and schedule the shift. Once you have scheduled the shift, its status is changed to 'Concept planning'. (See 'Procedure: accepting a request via the plan board'.)

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Procedure: accepting a request via the plan board

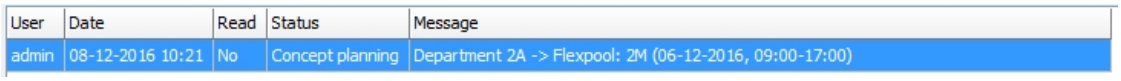
You have seen a request to subcontract a shift on your message window.

1. Open the staff schedule for the relevant period.
2. Schedule the shift in the usual way.

   Once you have scheduled the shift, its status is changed to ‘Concept planning’.

3. Right-click on the shift.
4. Select ‘Subcontract’. The status of the subcontracted shift is shown on the menu.

   On the message window, the request is moved to the ‘Concept planning’ status group.

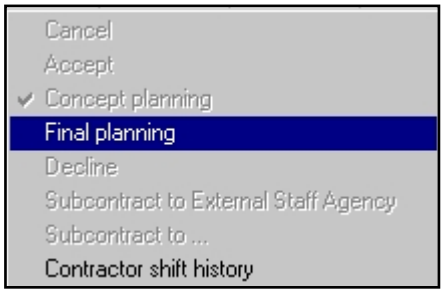


User	Date	Read	Status	Message
admin	08-12-2016 10:21	No	Concept planning	Department 2A -> Flexpool: 2M (06-12-2016, 09:00-17:00)

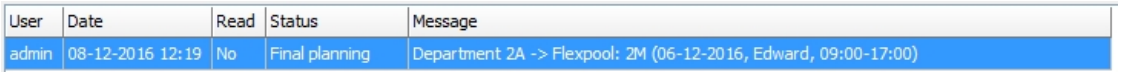
   The planner who made the request receives a message saying that the request has been accepted.

Procedure: definitively scheduling a subcontracted shift

1. Open the schedule for the relevant period.
2. Right-click on the shift.
3. Select ‘Subcontract’ > 'Final planning'.



4. On the message window, the request’s status is changed to ‘Final planning’.



User	Date	Read	Status	Message
admin	08-12-2016 12:19	No	Final planning	Department 2A -> Flexpool: 2M (06-12-2016, Edward, 09:00-17:00)

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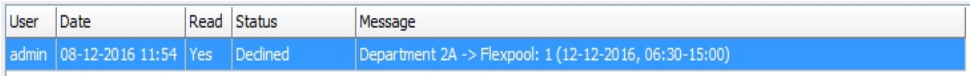
Procedure: refusing a request to subcontract a shift

1. Double-click on the message icon  .
2. If necessary, click on the 'Refresh' button to display new messages.

   The subcontracting request can be found in the 'Open' status group of the subcategory 'Subcontract shift'.

3. Right-click on the request.
4. Select 'Decline'.

   The status of the request is changed to 'Declined' and the planner who made the request is sent a message saying that it has been refused.



User	Date	Read	Status	Message
admin	08-12-2016 11:54	Yes	Declined	Department 2A -> Flexpool: 1 (12-12-2016, 06:30-15:00)

Procedure: subcontracting a shift to the External Flexpool

A shift can be subcontracted to the External Flexpool only if it is listed in the 'Vacant shifts' frame at the bottom of the plan board.

1. Right-click on the shift you want to subcontract.
2. Select 'Subcontract' > 'Subcontract to external Flexpool'.

3. The shift is now locked and displayed in red. The pop-up text that appears if you move the mouse cursor over it reads "Contracted out to External Flexpool".

   Incoming messages regarding this subcontracted shift will be placed in the subcategory 'Status changed' on your message window.

   If you initially assign a shift that you have accepted to one of your own flex-workers, but subsequently decide that the shift will have to be subcontracted to the External Flexpool, you need to remove the shift from the schedule before subcontracting it.

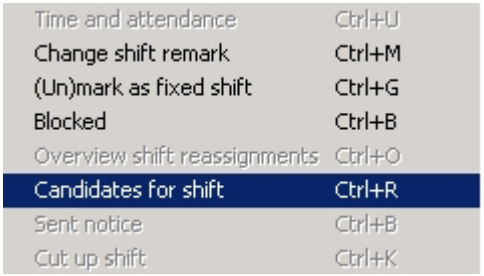
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Procedure: finding available employees outside the Flexpool

If not enough Flexpool employees are available to cover the vacant shifts, the Flexpool planner is also able to check whether other departments have employees available to help out, before contacting an External Flexpool (which is usually more expensive). This can be done by the 'Candidates for shift' functionality.

> If departments do not have a lot of work, they usually assign overstaffed shifts to employees because employees need to work their hours. Therefore, it is hard for a Flexpool planner to check if other departments have employees available without actually contacting the planners of the other departments. If the department planners assign a duty property to these shifts (e.g. Available For Work) it is easier for the Flexpool planner to identify employees that are available to cover the subcontracted shift. The subsection entitled 'Using duty property Available for work' describes how this duty property can be realized.

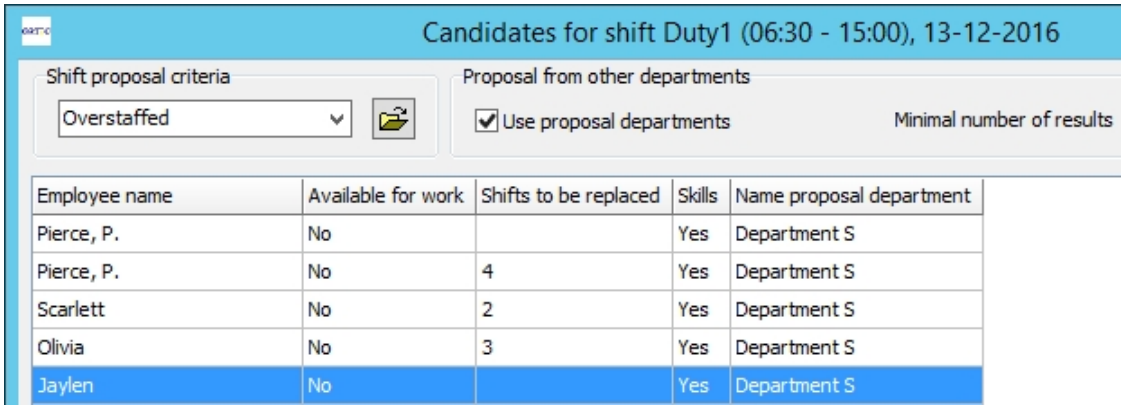
1. Right-click on the shift you want to find available employees for.
2. Select 'Candidates for shift'.



3. In the popup screen, select the option 'Use proposal departments'.
4. Click on 'Refresh'.

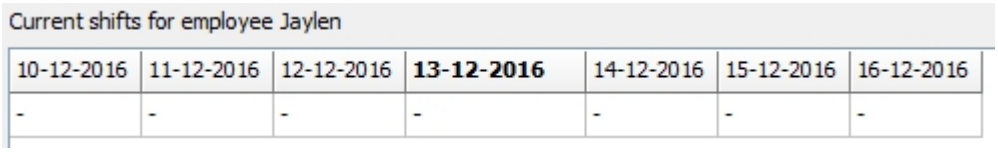
   This will show a list of employees from other departments, together with a number of columns based on the selected set of shift proposal criteria. One of these criteria should check on the duty property which indicates that an employee is available for work. The subsection entitled 'Using duty property Available for work' describes how this can be realized.

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The departments for which the Flexpool planner will see available employees can be configured in the Maintenance/Organization menu. To do this, select the Flexpool department and go to the tab "Shift Proposal Criteria". In the section "Proposal from other departments" the proposed departments can be selected.

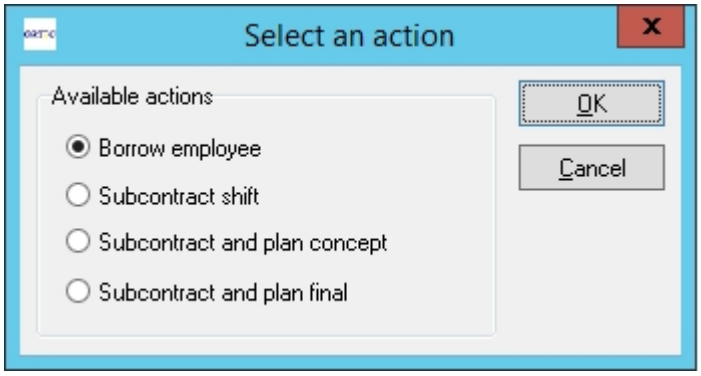
5. Select an employee that is available for work.
6. Optional: You can check the current shifts of the selected employee in the bottom of the screen to see if the vacant shift fits his schedule.



7. Click on "Ok".

   A popup appears which gives the Flexpool planner a number of options. He can either borrow the employee from the proposal department or subcontract the shift to the proposal department. In the latter case he can choose to subcontract the shift without actually planning it or choose to subcontract the shift and plan it in status 'Concept' or 'Final'.

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8. Select the appropriate action and click on "OK".

   After using the candidates for shift window to assign a vacant shift to an employee, the shift is now either planned in the Flexpool department with the borrowed employee (refresh the planboard to see this change) or subcontracted to the proposed department.

> The candidates for shift functionality can also be used by the Flexpool planner to find the 'best' employee within the Flexpool itself. In this case, he can follow the same procedure as described above but without steps 3 and 8.

5.3 Subcontracting: External Flexpool perspective

In practice, the Flexpool planner and the External Flexpool planner will normally be the same person. This is because, in ORTEC Workforce Scheduling, the External Flexpool is a fictional department, which exists to allow the administrative assignment and management of shifts that are subcontracted to real external staff agencies. From the External Flexpool's perspective, the subcontracting process works as described in the subsection entitled 'Subcontracting: Flexpool perspective'.

> To schedule subcontracted shift for the External Flexpool, the temporary worker to whom the shift is assigned needs to be registered in ORTEC Workforce Scheduling in the same way as an ordinary staff member.

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6 Preferred and forbidden departments

The Flexpool Module adds features to the bookkeeping of employee preferences regarding subcontracting. After enabling the functions for preferred and forbidden departments, this information can be added to each employee. The preferred and forbidden departments can be used in several parts of ORTEC Workforce Scheduling. The functionality is specifically useful for the Optimizer and candidate for shift proposal criteria. We will first describe how to set preferred and forbidden departments. Then, the possible configurations using the preferred and forbidden departments are described.

6.1 Setup of forbidden departments

The **Forbidden departments** tab can be found via **Employee** > **Employee management** > **Schedule data**.

Procedure: Maintaining forbidden departments

1. Select 'Employee' from the menu bar and select 'Employee Management'.
   - Alternatively: Double click on an employee in an open plan board to go directly to that employee in the 'Employee Management' screen.
2. Open the 'Schedule data' tab and open 'Forbidden departments'.

   You can add new, alter existing or end multiple forbidden departments in this screen.

> The list shows only departments that are valid in the period that is selected in the bottom of the screen. You can adjust this period by changing the begin or end date.

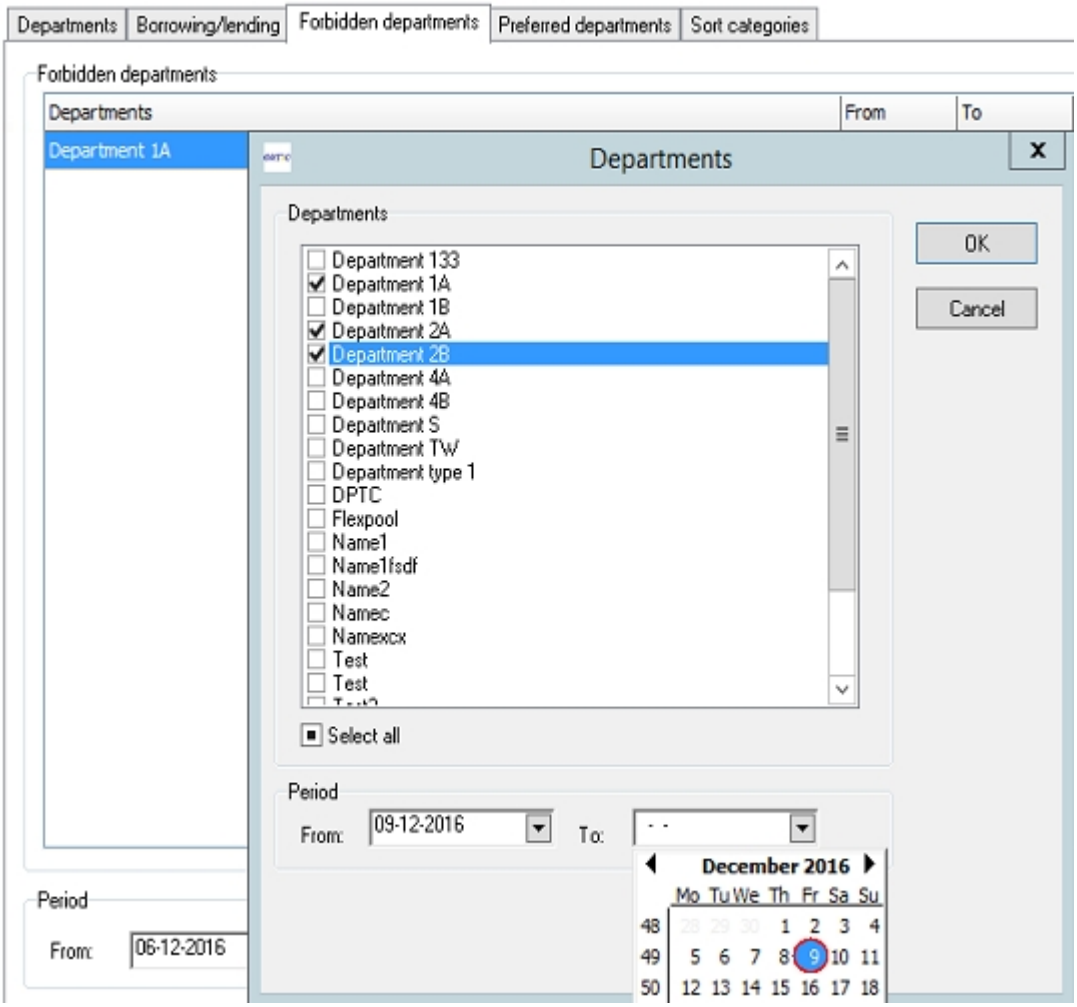
Procedure: Add forbidden departments

1. Follow the procedure 'Maintaining forbidden departments' and click on .
2. Select one or more departments that you want to define as forbidden department for this employee.
3. Set the period in which the department is listed as forbidden department.

> When leaving the end-date open, the department is listed as forbidden department indefinitely.

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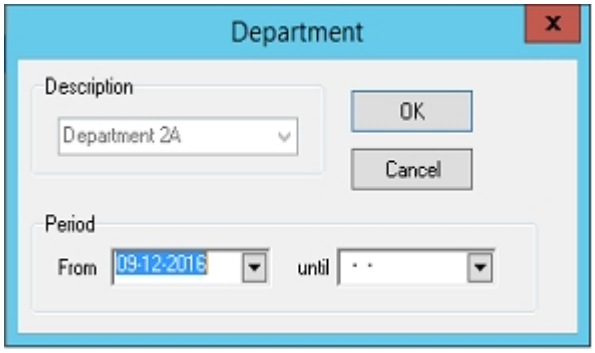
4. Click OK to add the selected departments.



Procedure: Change Periods of forbidden departments

1. Follow the procedure 'Maintaining forbidden departments'.
2. Select the department you want to change the period of and click on .
3. A pop-up is shown where you can change the begin date and end date.

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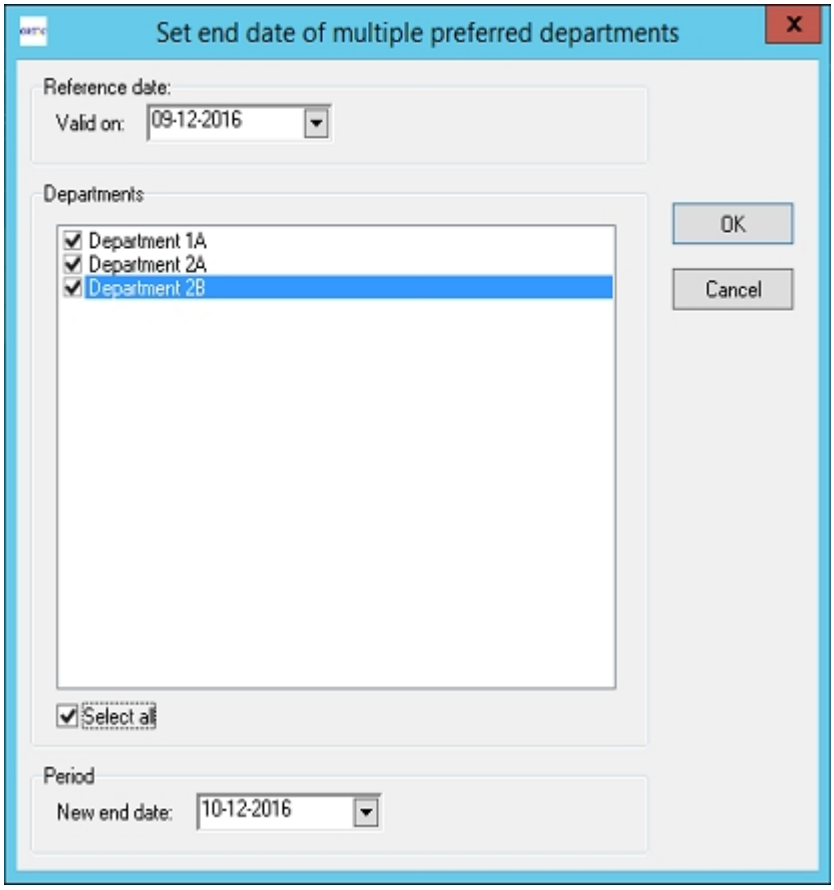
4. Click on OK to update the period.

> If the changed validity period of the department is outside the selection period of the forbidden departments list, the department is no longer shown on the list.

Procedure: Set end date for multiple forbidden departments

1. Follow the procedure 'Maintaining forbidden departments' and click on .
2. A pop-up is shown where you can select the reference date on which you want to see the departments that have a valid forbidden department.
3. Select the departments you want to set the end date.
4. Select the date you want as end date.

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5. Click on OK.

> Departments that already have an end date, but are valid in the reference date, are listed in the pop-up and can be updated to a new end date.

Procedure: Delete forbidden departments

1. Follow the procedure 'Maintaining forbidden departments'.
2. Select the department you want to delete and click on .

6.2 Setup of preferred departments

The **Preferred departments** tab can be found via **Employee** > **Employee management** > **Schedule data**. The procedures of preferred departments are very similar to the procedures of forbidden departments. The only difference is that for preferred departments, priorities have to be entered. The priorities can be used as weight value for comparing multiple preferred departments.

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Procedure: Maintaining preferred departments

1. Select 'Employee' from the menu bar and select 'Employee Management'.
   - Alternatively: Double click on an employee in an open plan board to go directly to that employee in the 'Employee Management' screen.
2. Open the 'Schedule data' tab and open 'Preferred departments'.

   You can add new, alter existing or end multiple preferred departments in this screen.

   > The list shows only departments that are valid in the period that is selected in the bottom of the screen. You can adjust this period by changing the begin or end date.

Follow the procedures of the forbidden departments for adding, changing, setting an end date and deleting preferred departments and use the 'Procedure: Maintaining preferred departments' for step 1.

6.3 Labor rules

Set preferred and forbidden departments are not automatically visible on the department plan board. There are two labor rules that check whether the department of an assigned shift corresponds with a preferred or forbidden department of the employee.

Procedure: Add 'Forbidden department' labor rule

1. Select 'Maintenance' from the menu bar and select 'Employment conditions'.
2. Select the tab 'Labor rules'.
3. Add a new or open an existing labor-time set.
4. Add a new constraint of type 'Forbidden departments'.
   - You can select what type of violation is displayed in the plan board when this criterion is violated.
   - Specific employee criteria can be selected to determine for which employees this criterion is applicable.

Procedure: Add 'Preferred department' labor rule

1. Select 'Maintenance' from the menu bar and select 'Employment conditions'.
2. Select the tab 'Labor rules'.
3. Add a new or open an existing labor-time set.
4. Add a new constraint of type 'Preferred departments'.
   - You can select what type of violation is displayed in the plan board when this criterion is violated.
   - Optional is to select whether only the highest priority preferred department on a day is allowed.

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- Optional is to count the assigned departments of an employee as preferred department, with a selectable priority.
- Specific employee criteria can be selected to determine for which employees this criterion is applicable.

6.4 Scheduling criteria

The Optimizer can take preferred departments into account, when the 'Preferred department criteria' is added to the scheduling criteria. This way, the assignment of shifts is based on the set preferred departments.

Procedure: Add 'Preferred department criteria' scheduling criterion

1. Select 'Planning' from the menu bar and select 'Schedule management'.
2. Select the department of whom you want to add the preferred department criteria in the department drop-down list.
3. Open the tab 'Scheduling criteria'.
4. Add a new or open an existing scheduling criteria set.
5. Add a new criterion of type 'Preferred department (crit.)'
   - Optional is to count the assigned departments of an employee as preferred department, with a selectable priority.
   - Select whether the difference in priority should be squared or not.
   - Specify the minimal number of available hours per week of an employee.
   - Specify the criterion weight.

6.5 Shift proposal criteria

The 'Candidates for shift' window uses a criteria set that determines what employee is proposed. Preferred and forbidden departments can be added as shift proposal criteria.

Procedure: Add 'Preferred or forbidden department' shift proposal criterion

1. Select 'Maintenance' from the menu bar and select 'Organization'.
2. Select the desired level in the organization you want to add the shift proposal criterion in the left part of the window.
3. Open the tab 'Shift proposal criteria'.
4. Add a new or open an existing shift proposal criteria set.
5. Add a new criterion of type 'Preferred or forbidden department'.
   - Select whether only permitted staff is displayed in the shift proposal screen. This hides candidates with a forbidden department for the selected shift.
   - Select whether the priority of the preferred departments per candidate is visible in the shift proposal screen.

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- Optional is to count the assigned departments of an employee as preferred department, with a selectable priority.
- Select whether only staff with a preference for the department is displayed in the shift proposal screen. This hides all candidates that do not have a preference for the department of the selected shift.
- Specify whether the proposed candidates should be ordered ascending, descending or not ordered based on this criterion.
- Optional is to display the criterion in the proposal, in the proposal details only or hide the criterion in the shift proposal screen.

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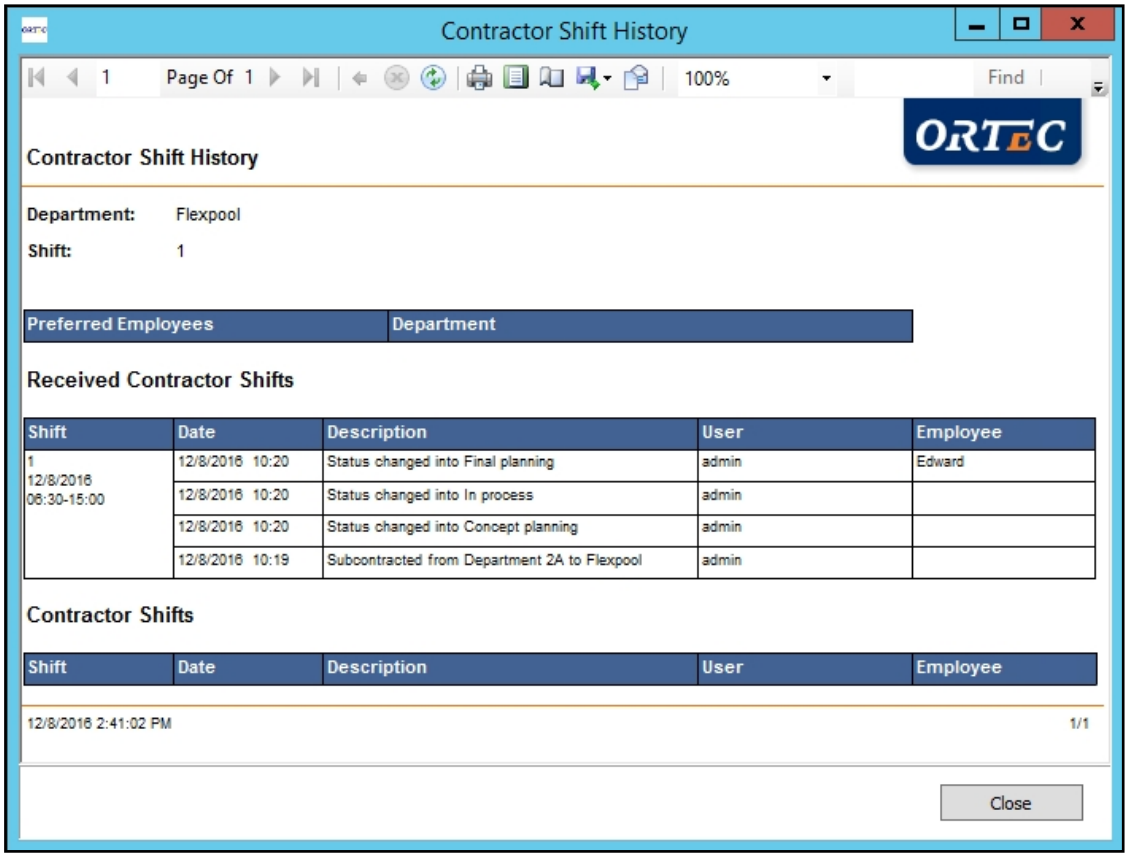
7 Flexpool related overviews

7.1 History of a subcontracted shift

You can view a status summary for a subcontracted shift – known as a shift history – at any time. The history shows by whom and when the shift was scheduled (both provisionally and definitively) and whether the contracted-out shift has been passed on to an external staff agency.

Procedure: viewing a shift history from the plan board

1. Open the schedule for the relevant period.
2. Right-click on the shift whose history you want to view.
3. Select **Subcontract** > **Contractor shift history**.



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Procedure: viewing a shift history from the message window

1. Select ‘General’ from the menu bar and select ‘Messages’.

   - Alternatively: double-click on the status bar message icon , in the bottom right-hand corner of the window.

   In the upper right-hand part of the window, you will see a list of incoming messages, with the status of each indicated.

2. Next, select the message that relates to the shift whose history you want to view.
3. Click on the ‘History’ button.

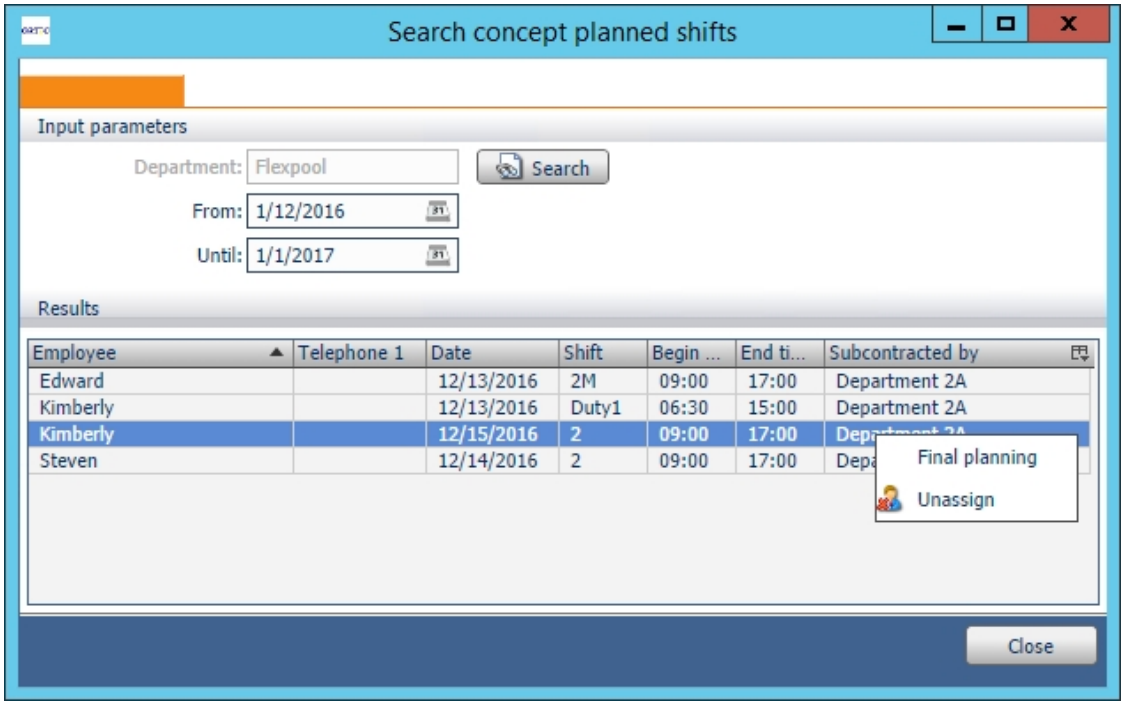
7.2 Concept planned shifts overview

Instead of searching through individual subcontracted shifts in the plan board, the Flexpool agency planner can use the ‘Overview concept planned shifts’ window to quickly see all concept planned shifts for a certain department.

Procedure: open the concept planned shift overview

1. Select ‘Overview’ from the menu bar and select ‘Search concept planned shifts’.

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2. Select the department and period for which you want to see the concept planned shifts and click on the 'Search' button.

The same window also provides options to quickly change the subcontract status to 'Final planning' or to unassign the shifts.

Procedure: update a shift from the concept planned shift overview

1. In the concept planned shift overview, right-click on the shift you want to update.
2. Either select 'Final planning' if you want to update the shift from concept planning to final planning or 'Unassign' if you want to unassign the shift for the currently planned employee

7.3 MS Report 'Flexpool statistics'

All subcontracted shifts to the flexpool are presented in this report, as summary and as individual shifts per department. Furthermore it is shown what percentages of shifts are canceled, declined, pending, in process, concept planned and final planned.

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Procedure: Open the flexpool statistics report

1. Select 'Reports' from the menu bar and select 'Flexpool statistics'.

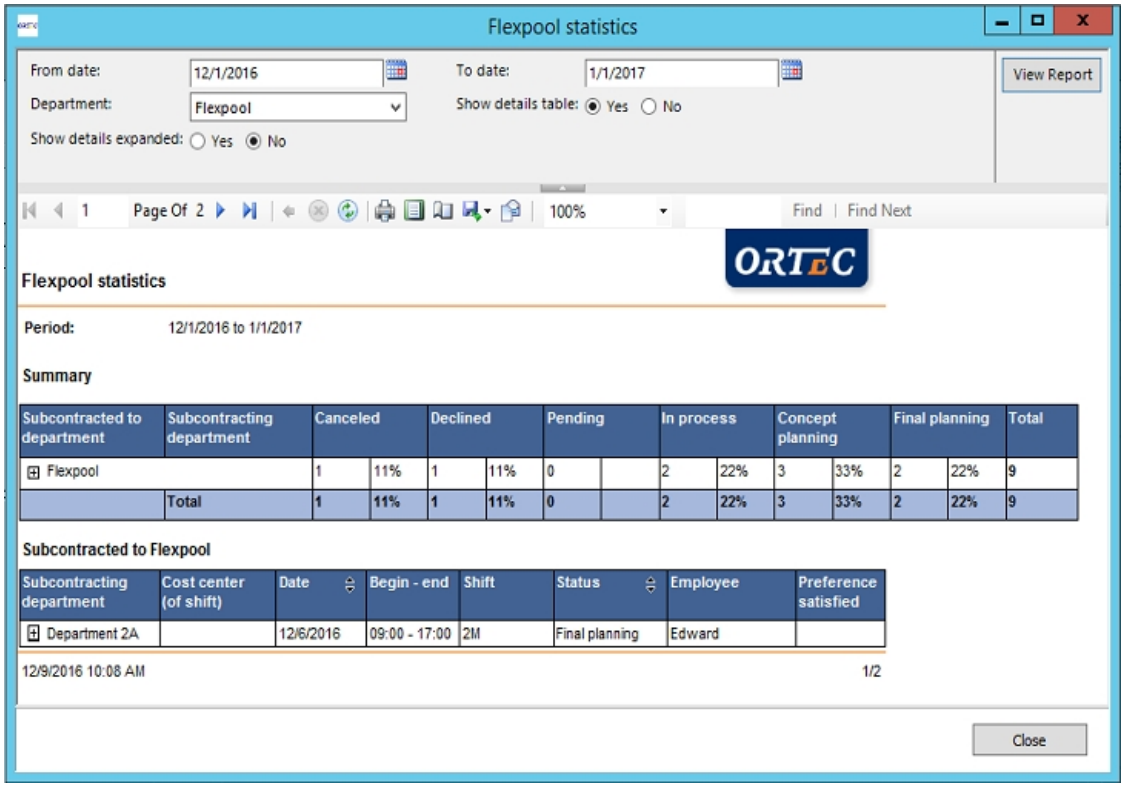
   If the report is not available here, first make sure you're authorized and the report is added to the menu.

2. Select the department you are interested in.

   Only departments that have the property 'Flexpool' enabled in the Maintenance/Organization form are visible in the picklist.

3. Select the period of interest and push 'View report'.

   When enabling the 'Details table', a second table in the report is generated showing the details of all individual shifts in the selected period.



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8 Other subjects

8.1 Original shift and new shift

The Flexpool module provides the ability to go quickly and with minimal effort to a position in the schedule, from the message window. This also works when the relevant period has not yet been opened. You can choose between the position of the original shift and the position of the new shift.

Procedure: go to original shift

1. Open the message window.
2. Click on a message: the details of the message are shown as text in the message frame below.
3. Click on the 'Original shift' button: the relevant period of the original shift is opened. In addition, the day the duty is related to, is automatically selected.

Procedure: go to new shift

1. Open the message window.
2. Click on a message; the details of the message are shown as text in the message frame below.
3. Click on the 'New shift' button: the relevant period of the new shift is opened. In addition, the day the duty is related to, is automatically selected.

8.2 Subcontracting to other departments

In many cases a shift that is to be subcontracted, will be placed at the Flexpool agency. This choice is not compulsory. As a planner you can subcontract a shift to another department of your choice. The handling of such a request is similar to that of the Flexpool agency. In both situations, the receiving department can reject or accept the request, and – in case of accepting – will look for an employee who is able to do the subcontracted shift.

- Only vacant shifts can be subcontracted.
- A shift that has been subcontracted to another department can be subcontracted by this department to the Flexpool agency (via the 'Subcontract/Subcontract to FlexPool' option on the right mouse menu). In addition, it is possible to subcontract this shift again from the department to another department (via the 'Subcontract/Subcontract to ...' option on the right mouse menu).
- Also, from the Flexpool agency you can directly subcontract to other departments (via the 'Subcontract/Subcontract to ...' option on the

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right mouse menu). Especially if subcontracted to an employee agency, this option will be used.

Procedure: subcontracting to other department

1. Open a schedule.
2. Right-click the shift you want to subcontract.
3. Click 'the Subcontract' menu option.
4. In the next menu click on the 'Subcontract to ...' menu option. The 'Subcontracting shift' window opens (which is almost identical to the one that opens when subcontracting to the Flexpool agency).
5. Select the department to which you want to subcontract: the department has now been selected.
6. Enter the remaining data if needed (Preferred employee, Remarks and 'Plan the same employee as much as possible').
7. Click OK: the shift has been subcontracted.

8.3 Flexpool expressions for compensation rules

For employees who are working both in their own department and in the Flexpool, it can be important to make a difference between Flexpool shifts and regular shifts. For this, the 'ISFLEXPOOLSHIFT' expression is available in . With this expression you can differentiate between regular shifts and Flexpool shifts in the calculation of compensation rules. A Flexpool shift is a shift subcontracted to a Flexpool department.

The expression 'ISFLEXPOOLDEPARTMENT' checks whether a department is marked as Flexpool department. All scheduled shifts in the Flexpool department, whether these are Flexpool shifts or non-Flexpool shifts, are effected by this expression.

Besides these two expressions, there is a global setting that determines whether the subcontracted shift has to be treated in the compensation rules as shift in the 'original' department or shift in the 'subcontracted to' department.

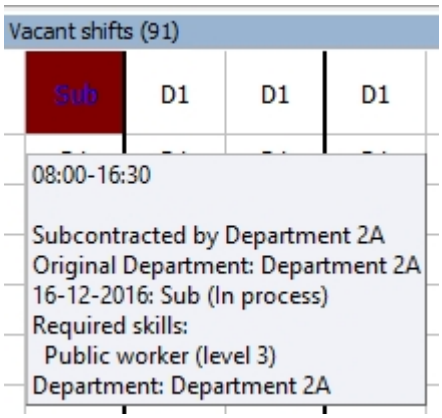
8.4 Required skills

It could be that for some subcontracted shifts certain skills are required by an employee. As a Flexpool agency planner you need to know whether this is the case, so you can choose the right employee for the subcontracted shift. In general, there are two options to assign required skills to (subcontracted) shifts:

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1. Assign required skills to individual activity types. Each shift that contains one or more of these activity types requires the skill(s) selected for these activity types.
2. Assign required skills to a whole department. In this case all shifts that are created in this department require the selected skill(s).

The required skill(s) and skill level(s) are presented in the shift hint text of the Flexpool agency department. This allows a Flexpool agency planner to quickly check the required skills, without having to open details of every shift.



8.5 Using duty property 'Available for work'

can be used to make it easier for a Flexpool agency planner to find an available employee outside the Flexpool agency, but within the own organization. This is especially relevant if departments assign overstaffed shifts to employees because employees need to work their hours. A duty property can be made available to sort or filter candidates for shifts in the ‘Candidates for shift’ option.

Procedure: Defining a duty property 'Available for Work'

1. Go to the menu option **Maintenance** > **Organization**.
2. Select the highest department level (or the department level of choice).
3. Click on the tab **Duty properties**.
4. Click the **New** icon to add a new duty property.
5. Enter a name for the duty property (e.g. 'Available for Work').
6. Click **OK**.

   The new duty property has been created and is shown in the list of duty properties. Now the attributes of the duty property can be changed.

7. Select the created duty property.

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8. Enter an abbreviation, select Type ‘Yes/No’ and Default value ‘No’.

Property	Abbreviation	Type	Default value
Available for Work	AFW	Yes/No	No

Procedure: Assigning duty property to an overstaffed shift

1. Go to the master schedule.
2. Right-click on the overstaffed shift.
3. Click on ‘Duty properties’.



4. Click the duty property created in the previous procedure to change its value to ‘Yes’.

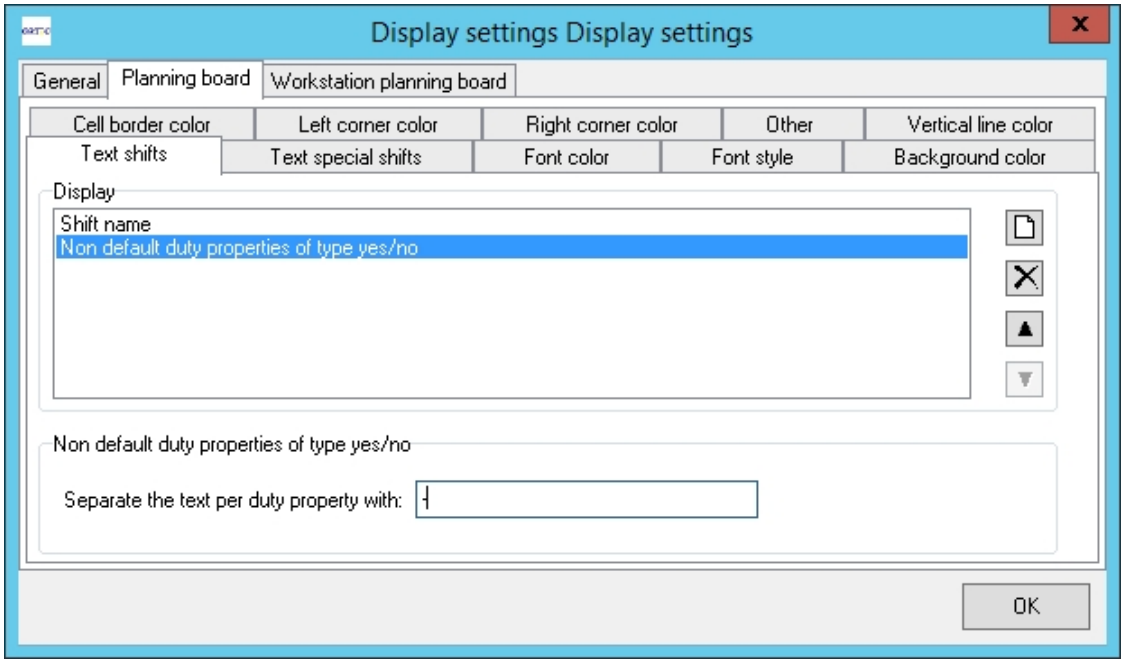
> The check mark does not depend on the indicated default value for a certain property. A checkmark indicates that the value of the property is set to ‘Yes’. No check mark means the value is set to ‘No’. Whether or not the abbreviation of a property is presented in the master schedule does depend on the default value (only non-default values are shown).

Procedure: Showing duty property in the master schedule

After changing the value of the duty property to ‘Yes’ for a certain shift, the abbreviation can be presented in the master schedule. In order to activate this, a display setting must be configured.

1. Go to the menu option **General** > **Plan board settings**.
2. Click on the tab **Display settings**.
3. Open the appropriate display setting (either under ‘General’ or ‘Own’).
4. In the popup menu that appears, click on the tab **Planning board**.
5. Click on the tab **Text shifts**.
6. Click the **New** icon to add a new display.
7. In the dropdown menu, select the option ‘Non default duty properties of type yes/no’ and click on **OK**.

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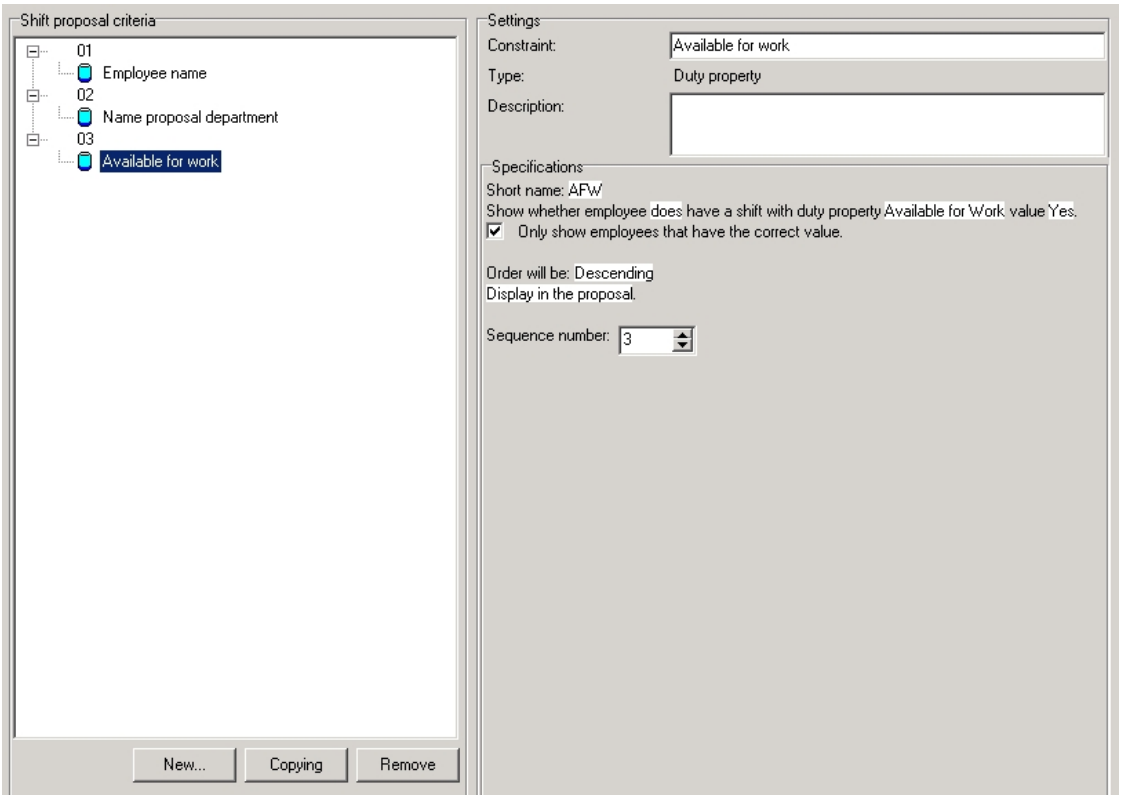
If there are multiple duty properties of type yes/no, they can be separated by a user defined separator. This can be configured in the same tab **Text shifts**, in the field 'Separate the text per duty property with'.

Procedure: Adding duty property to shift proposal criteria

Shift proposal criteria are used in the 'Candidates for shift' functionality to select and display a list of employees for a vacant shift. These criteria can be configured so that the proposal only shows employees with a shift having the duty property 'Available for Work' set to 'Yes'.

1. Go to the menu option **Maintenance** > **Organization**.
2. Select the appropriate department (e.g. either the Flexpool agency or a parent department in case the shift proposal criteria are valid for multiple departments).
3. Click on the tab **Shift proposal criteria**.
4. In the section 'Shift proposal criteria', open the criteria set you want to use for the 'Candidates for shift' option.
5. In the popup, click on 'New' to add a new criterion.
6. Select 'Duty property' and click **OK**.
7. Click on the created criterion 'Duty property' and configure its attributes according to the screenshot displayed below.

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When using these criteria, the ‘Candidates for shift’ functionality will only show employees that have a shift with duty property ‘Available for Work’ set to ‘Yes’.

The 'Candidates for shift' functionality can be very useful for the Flexpool planner.

8.6 Flexpool module and the ESS module

The Employee Self Service website and mobile app give employees access to their personal schedule from any location. Flexpool shifts are visible for employees when these shifts are scheduled. However, scheduled subcontracted shifts can be 'Concept Planned' or 'Final Planned' in subcontract status. It is configurable whether 'Concept Planned' shifts should be visible in ESS.

PROCEDURE: ADJUSTING THE DEFAULT SETTINGS OF SUBCONTRACTED SHIFTS IN ESS

1. Open the application ORTEC System Configuration and login.
2. Open the tab Configuration / Settings Manager. Here you find the following two settings:

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- CWGSESS\Personalroster\ShowConceptPlannedShifts: This setting is used to show Flexpool shifts with status concept planning.
- CWGSESS\Personalroster\SubcontractStatusOverrulesShiftStatus: This setting is used to overrule the status of the shift.

Both settings have the default value 'TRUE'.

3. Adjust the settings to your desire. The outcome of the configuration is shown in the next table.

Shift status	Setting ShowConceptPlannedShifts	Setting SubcontractStatusOverrulesShiftStatus	Shift in ESS schedule
Published or higher Subcontracted shift status 'Concept Planned'	TRUE	TRUE	Shown
	TRUE	FALSE	Shown
	FALSE	TRUE	Not shown
	FALSE	FALSE	Shown

Subcontracted shifts of status 'Final Planned' behave similar as non-subcontracted shifts. The two described settings do not have influence on 'Final Planned' subcontracted shifts.

8.7 Flexpool module and Central departments

The functionality of the Flexpool module is different in Central departments. It is not possible to subcontract shifts from a Central Department plan board, nor can received subcontracted shifts be planned in a central plan board.

Received subcontracted shifts scheduled in one of the decentralized departments are visible in the central plan board. Both status 'Concept Planned' and 'Final Planned' subcontracted shifts are visible, but the status cannot be changed in the central plan board.

Subcontracted shifts send from a decentralized department and planned in the receiving department are not shown in the central plan board. The borrowed employee for this subcontracted shift is visible in the decentralized plan board, in the central plan board this employee is not visible.

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Contact information

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