

# ORTEC Workforce Scheduling 7

## User Manual Module MS Reporting

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ORTEC

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# 1 MS Reporting

## 1.1 System reports in MS Reporting format

We'll cover all system reports, giving brief descriptions and explaining MS Reporting's general functions. Next, we'll dive into detailed information and report examples. Finally, we'll explain how to add reports in ORTEC Workforce Scheduling (ORTEC WS) if they're not visible. Besides system reports, there are also example reports accessible for use in ORTEC WS.


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# 2 System Reports

Here you'll find an overview of the existing reports including a short description. We'll conclude by explaining the MS reporting functionality in general.

## 2.1 Overview ORTEC WS Client reports

| Report | Short description |
|---|---|
| | Overview shifts per department |
| | Overview of the status changes of departments |
| | Overview of Flexpool statistics |
| | Overview of the department schedule |
| | Overview of account balances (per department or per employee) |
| | Overview of shift assignments per day |
| | Overview of assigned shifts per employee |
| | Overview of requests per department |
| | Overview of violations per department |
| | Overview workstation assignments per day |
| | Overview of year schedule per employee |

## 2.2 Overview ORTEC WS for Employees reports

| Report | Short description |
|---|---|
| | Overview of account balances of the employee |
| | Overview of the schedule of the department of the employee |
| | Overview of shift reassignments of the employee |
| | Overview of the personal schedule of the employee |
| | Overview of the schedule for each round of the self scheduling process |

## 2.3 General MS Reporting functionality

The following functionality is available for every MS Reporting report in the header when opening a report:





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- Go to the next, the last, the previous or the first page
- Back
- Stop running the report
- Refresh the report
- Print the report
- Print Layout
- Page Setup
- Export the report to XML, CSV, PDF, MHTML, Excel. TIFF or word file.
- Zoom
- Find text in report

In some reports it is possible to interactively sort, filter, expand and/or collapse data in the report.

An option “Allow multiple windows” is available in ORTEC WS to allow you to open multiple reports at the same time. If this option is not visible in your configuration, you can add this option through the customize menu. See paragraph “Adding reports to the menu bar” for more information.


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# 3 Examples of the system reports

## 3.1 Attendance list per department

This report provides an overview of the shifts per department.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |
| Employees | Employee filter. |
| Show employee as | Name, initials, prefix; First name, prefix, name; employee number. |
| Activities | All available activities in the selected period or possible to choose. Shifts without any of the chosen activities are not shown in the report. |
| Show function | Employee function. |
| Show short signature | Select Yes to show a column for short signatures and select No to hide this column. |


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# 3.2 Auditing - Overview department status changes

This report provides an overview of the status changes of departments. Departments can have different statuses (planning, published, closed, approved, processed). This report shows which user has changed the department status.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |

The adjusted date is shown with a red background color if the status of a period is set back.


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# 3.3 Flexpool statistics

This report provides an overview of the Flexpool statistics. An overview is shown with the number of shifts that are subcontracted to the Flexpool department(s) and an overview of the statuses of the subcontracted shifts.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. Flexpool departments can be selected only. |
| Show details table | Select Yes to show the details of shifts subcontracted to the flexpool department. Select No to show the summary only. |
| Show details expanded | Select Yes to show the details table expanded. select No to show the details table collapsed. |


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# 3.4 Master schedule

This report provides an overview of the department schedule.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |
| Show shift | Indicate how shifts should be presented in the schedule: shift names, begin and end times, shift names and begin and end times. |
| Show duty color | Select Yes to show duty color 1 as background color for shifts. Select No to not show duty colors. |
| Show employee as | Indicate how your employees should be presented in the schedule: last name, initials and prefix, or first name, prefix and name, or employee number. |
| Sort on | Sort on employee name or grouplabel, employee name. |
| Show calculations | Select Yes to show calculations that are selected in the parameter Employee Calculations. Select No to not show calculations. |
| Column size | Indicate the column size in the report: small, medium or wide. |
| Employee calculations | Select a set of calculations to show. In the parameter Calculations it is possible to select which field of the calculation set should be shown. |
| Sort employees without grouplabel | The employees without a grouplabel can be shown on the top or on the bottom. |
| Calculations | Select the calculations to show. The calculations marked with * are not shown in the report, because it is not possible to check the calculation permissions of the user. |
| Filter on grouplabel | Select the grouplabel(s) to show. |

| Options | Explanation |
|---|---|
| Show employees without shifts | Select Yes to show employees without shifts. Select No if you want to hide employees without shifts. |
| Show memo | Select Yes to show memos on the report. Select No if you don't want to show memos. |
| Show shifts other departments | Select Yes to show the shifts assigned to employees in other departments than the selected department. These shifts will be presented in Italic font and are colored gray. |
| Show vacant shifts | Select Yes to show vacant shifts on the report. Select No if you don't want to show vacant shifts on the report. |


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# 3.5 Overview account entries

This report provides an overview of the entries on an account.

| Options | Explanation |
|---|---|
| Department | Department filter |
| Account | Account filter |
| From and to date | Period filter |
| Employees | Employee filter |
| Show report kind | Show account entries per employee or per department |
| Include only entries of selected department(s) in the total | Select Yes to see only account category values entered on the department that was selected in the department filter. Select No to see all account category values of the selected employees, including values for other departments. |
| Show details | Select Yes to show the different account category values per employee and select No to see only the total value per employee when running the report. After running the report you will be able to adjust the level of detail. |
| Show hours | Select Yes to show a column with hours next to the column with the value. Select No to hide this column. |

Interactive option to expand / collapse information.


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# 3.6 Overview shifts

This report provides an overview of the shift assignments for a period.

| Options | Explanation |
|---|---|
| From and to date | Period filter |
| Department | Department filter |
| Activities | Select the activities that should be shown in the report. |
| Show employee as | Name, intials, prefix; first name, prefix, name; employee number |
| Show duty color | Select duty color 1, duty color 2 or none. |
| Show shift time | Select Yes to show the begin- and end time of the shifts. Select No to hide this column. |
| Show employees from other departments | Select Yes to show employees from other departments. These employees are shown *italic*. |


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# 3.7 Personal schedule

This report provides an overview of the personal schedule of an employee.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |
| Employees | Employee filter. |
| Show workstation | Select Yes to show the workstation of the activity. Select No to hide the workstation. |


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# 3.8 Requests

This report provides an overview of the requests.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |
| Employees | Employee filter. |
| Wishtype | Wishtype filter. |
| Description | Select Yes to show the description of the request. Select No to hide the description. |


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# 3.9 Violations

This report provides an overview of the violations. These violations are related to the linked labor-time rules of employees.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |
| Employees | Employee filter. |


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# 3.10 Workstation Planning

This report provides an overview of the workstation assignments per day.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |
| Show employees without workstations | Select Yes to show the employees without a workstation and No to hide these employees. |
| Show employee name as | Firstname; firstname & name; name, initials. |
| Show workstation color | Yes to show the workstation color (Maintenance, location and workstations, tab workstations, color) and No to hide this color. |
| Show workstation description | Yes to show the description of a workstation (Maintenance, location and workstations, tab workstations, field description) and No to hide this description. |


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# 3.11 Year schedule

This report provides an overview of the year schedule of a department per employee.

| Options | Explanation |
|---|---|
| Year | Year filter. |
| Department | Department filter. |
| Column size | Small, medium or wide. |
| Show shifts other departments | Select Yes to show shifts from other departments. These shifts are shown in light gray. |

Shifts on holidays have an orange color. The weekend days have a background color.


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# 3.12 Account for employee ESS

This report provides an overview of the account entries for an employee.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Account | Account filter. |
| Show decimals | Select Yes to show decimals. |
| Show description | Select Yes to show the description. Select No to hide this column. |
| Show hours | Select Yes to show a column with hours. Select No to hide this column. |
| Show weight | Select Yes to show a column with weight, expressed in percentage. Select No to hide this column. |
| Show details | Select Yes to show the different account category values and select No to see only the total value when running the report. After running the report you will be able to adjust the level of detail. |
| Show total account | Select Yes to show the account total at the bottom of the value column. Select No to see only the values per account category. |


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# 3.13 Master schedule ESS

This report provides an overview of the schedule of the department of the employee.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Show shift | Indicate how shifts should be presented in the schedule: shift names, begin and end times, or shift names and begin and end times. |
| Show duty color | Select Yes to show duty color 1 as background color for shifts. Select No to not show duty colors. |
| Column size | Indicate the column size in the report: small, medium, or wide. |
| Show employee as | Indicate how your employees should be presented in the schedule: last name, initials and prefix, or first name, prefix and name, or employee number. |
| Department | Department filter. |
| Sort on | Sort on employee name or grouplabel, employee name. |
| Sort employees without grouplabel | The employees without a grouplabel can be shown on the top or on the bottom. |
| Filter on grouplabel | Select the grouplabel(s) to show. |
| Show memo | Select Yes to show memos on the report. Select No if you don't want to show memos. |
| Show vacant shifts | Select Yes to show vacant shifts on the report. Select No if you don't want to show vacant shifts on the report. |
| Show shifts other departments | Select Yes to show the shifts assigned to employees in other departments than the selected department. These shifts will be presented in Italic font and are colored gray. |
| Show employees without shifts | Select Yes to show employees without shifts. Select No if you want to hide employees without shifts. |


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# 3.14 Overview shift reassignments ESS

This report provides an overview of the shift reassignments of the employee.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Exchange date used for period (instead of shift date) | Select Yes to use the date that the shift has changed for the selected period.<br>Select No to use the date of the shift for the selected period. |


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# 3.15 Personal schedule ESS

This report provides an overview of the personal schedule of the employee.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Show workstation | Select Yes to show the workstation of the activity. Select No to hide the workstation. |


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# 3.16 Self scheduling ESS

This report provides an overview of the schedule for each round of the self scheduling process.

| Options | Explanation |
|---|---|
| From and to date | Period filter. |
| Department | Department filter. |


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# 4 Add system reports in ORTEC WS

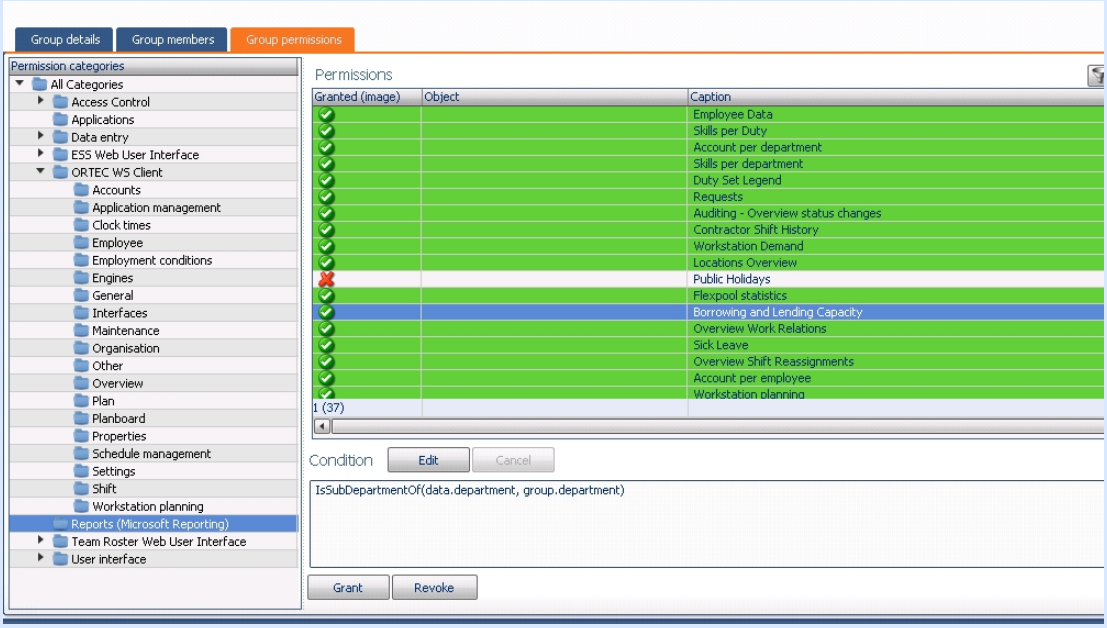
## 4.1 Assign report authorizations

Before you can actually open reports in ORTEC WS, report authorizations need to be assigned to the user(s).

When reports are uploaded to ORTEC WS, the system automatically adds an authorization for the report. These authorizations are available in Access Control in the category Reports (Microsoft Reporting).

For system reports the name of the report authorization is in Access Control the same as the name of the uploaded report.

Example




Follow the steps below to authorize the use of a report for a specific user group:

1. Open Access Control and activate the report authorization for the selected user group(s).
2. Open (or reopen) the ORTEC WS Client.
3. Click the button  to read the (adjusted) report definitions into ORTEC WS and to show these reports to all authorized users.

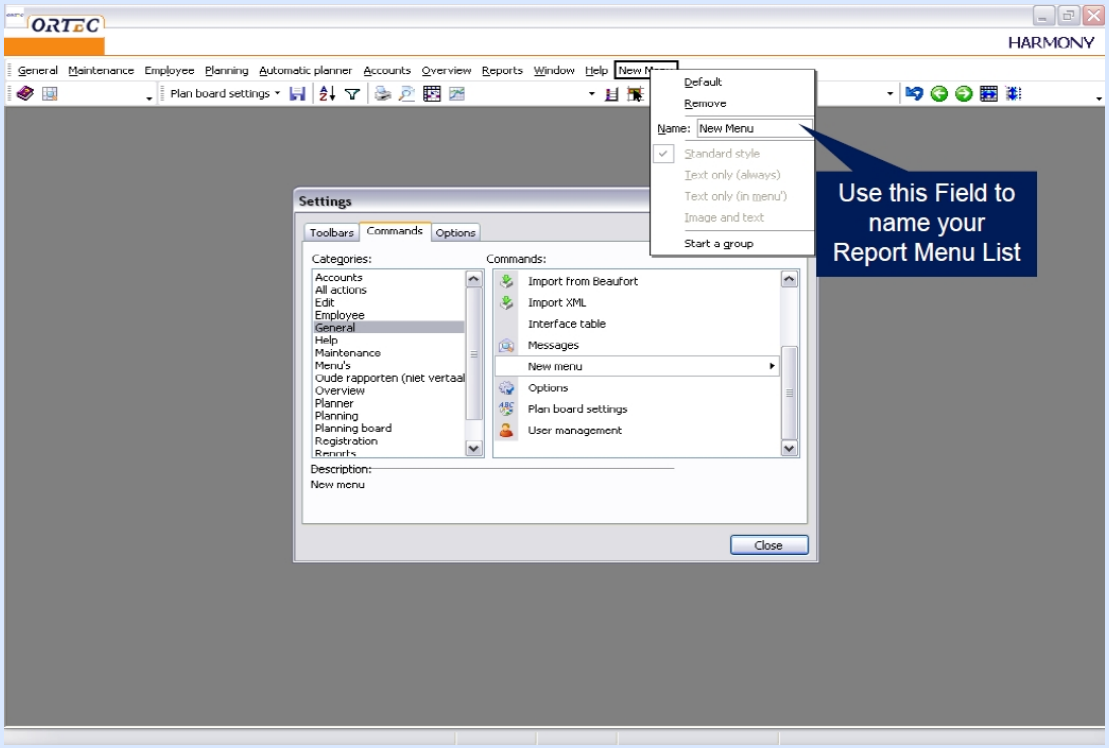

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The report is now available for all authorized users. If the report is not visible yet, it needs to be added to a menu as described below.

## 4.2 Add reports to the menu bar

Before adding new reports to the menu toolbar, a new menu must be added to the default toolbar.

Example




1. Right click the toolbar and select Customize…. A pop up window **Settings** appears.

2. Select the **Commands** tab and select Category **General** and Command **New menu**. Drag-and-drop the new menu to your toolbar.

3. Right click the new menu item on your toolbar (currently named 'New Menu') and change the menu name by entering the correct name in the field **Name**. Click **Enter** to confirm.

4. In the **Settings** window on the **Commands** tab, now select the category **Reports (Microsoft)**. The right side of the window now presents all reports that


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the user is authorized for and the menu options to refresh the report definitions and to show reports in multiple windows.

5. In the right side (**Commands** field) of the window, select report(s) and drag and drop them in your menu.

6. Optionally the name of the report(s) can be adjusted by right clicking the report(s).

7. In the **Settings** window, select **Close** and acknowledge your actions by selecting **Yes** on the window that appears next. In the next pop up window that appears, select **Yes** to make the new menu available to all other users, and **No** if it should only be available to the current user.

The selected report(s) are now available to use. Select a report from the menu bar to preview and/or print the report.

Activated reports can be removed from the **Reports** menu on the default toolbar as follows:

1. Right click the toolbar and select **Customize…**. A pop up window **Settings** appears.

2. From the **Reports** menu on the default toolbar, drag the selected report and drop it in the **Settings** window.

3. In the **Settings** window, select **Close** and acknowledge your actions by selecting **Yes** on the window that appears next. In the next pop up window that appears, select **Yes** to make the new menu available to all other users, and **No** if it should only be available to the current user.

The selected report is now removed from the **Reports** menu.


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