

ORTEC Workforce Scheduling 7

User Manual Module Self-scheduling

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ORTEC

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1 Self scheduling

Self scheduling is an additional module of **ORTEC Workforce Scheduling**. It helps companies schedule their workforce according to the Swedish model, based on the number of shifts required.

It includes a web page in **Employee Self Service (ESS) for employees** to enter their schedule and additional functionality for planners to set up scheduling periods, start scheduling rounds, and finalize the schedule before publication.

1.1 The concept of self scheduling

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

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

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

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2 Configure self scheduling

Be sure to activate **Self Scheduling** (Modules > modSelfRostering) and **Employee Self Service** (Modules > ModESS) within the **ORTEC WS Setting manager**. Contact your ORTEC representative when needed.

The following settings are relevant:

- (Required) The setting to use scheduling rounds (UseSchedulingRounds).
- (Optional) The setting to use duty groups (UseDutyGroups).
- (Optional) The setting to use wild cards (UseJokerWishes).
- (Optional) The setting to use the shift proposal criterion Understaffing that determines the under- and/or overstaffing of a shift (UnderstaffedSkillsHCrit).
- (Optional) The setting to use the skill requirement for duty demands (UseDemandedDutySkills).
- (Optional) The setting to use the employee calculation Ranking selfroster points that determines the position of an employee compared to his colleagues, when looking at the earned points of employees (SelfRosterPointRankingCalculation).

2.1 Dedicated server

It's possible to configure a dedicated server for Self Scheduling. Contact your ORTEC representative when needed.

The relevant settings in **ORTEC System Configuration** can be found in the **Configuration** tab. Go to **Settings Management** > **Settings Manager** > **ESSLoadBalancing** > **SelfScheduling**.

- Setting: DedicatedServerEnabled. States if a dedicated self scheduling server is configured. If True, the DedicatedServerNumber is used to handle self scheduling commands.

  Default value: **False**

  Possible values: **True** or **False**

- Setting: DedicatedServerNumber. Server number of the server that is dedicated to handling and processing the self scheduling commands.

  Default value: **50**

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When enabling this functionality it's advised to use the same configured interface server for the mobile app in OWSMobileApp\InterfaceServer\InterfaceServerNumber in the **Settings Manager**. This ensures that data for self scheduling will be processed on one single interface worker. Assure when moving the load to an interface worker that this worker is not already configured to process queue interfaces and normal interfaces that cause a high load on the worker.

2.2 Authorizations

Different authorizations regarding self scheduling are available in **Access Control** to assign rights to planners and to employees. Below is a summary of the authorizations related to self scheduling. The first section describes the authorizations for planners to use the self scheduling functionality in **ORTEC WS for Windows**. The second section describes the authorizations for employees to use the self scheduling functionality in **ESS**. Contact your ORTEC representative when needed.

2.2.1 Planners

To assign all relevant authorizations to the planners using self scheduling, select all authorizations in the permission categories:

- **Data Entry | Scheduling round**
- **Data Entry | Duty group**

And the following authorizations in the permission category **ORTEC WS for Windows | Schedule management**:

- **Scheduling period.Max. number of wildcards | Create**
- **Scheduling period.Max. number of wildcards | Read**
- **Scheduling period.Max. number of wildcards | Update**

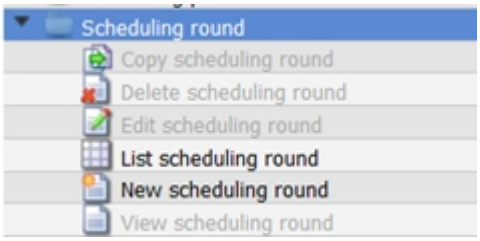
A detailed overview of the available authorizations for planners is described below. If you already assigned the authorizations mentioned above, then you can skip the detailed description.

Scheduling rounds

Permission category: **Data Entry | Scheduling round | ...**

Scheduling round: authorizations on the Scheduling round actions in the Data management window:

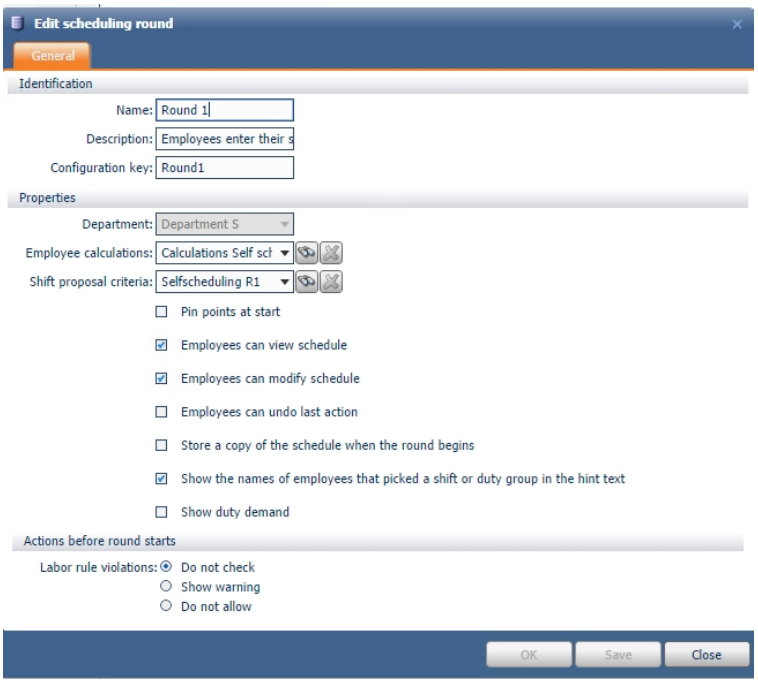
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Action Copy scheduling round requires Scheduling round | Create.

- Action **Delete scheduling round** requires **Scheduling round | Delete**.
- Action **Edit scheduling round** requires **Scheduling round | Update**.
- Action **List scheduling round** requires **Scheduling round | List**.
- Action **New scheduling round** requires **Scheduling round | Create**.
- Action **View scheduling round** requires **Scheduling round | Read**.

Scheduling round. General: to allow a user to create/read/update information in the pop-up window scheduling round:



Users can only read, enter or edit information in the fields in this window if they also have the authorizations for the specific fields/actions:

- **Scheduling round.Name**: to allow a user to create/read/update the name of the scheduling round.
- **Scheduling round.Description**: to allow a user to create/read/update the description value.

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- **Scheduling round.Configuration key**: to allow a user to create/read/update the configuration key value.
- **Scheduling round.Department_ID**: to allow a user to create/read/update the department value.
- **Scheduling round.Employee calculations ID**: to allow a user to create/read/update the employee calculation value.
- **Scheduling round.Shift proposal criteria ID**: to allow a user to create/read/update the shift proposal criteria value.
- **Scheduling round.Pin points at start**: to allow a user to create/read/update the checkbox value "Pin points at start".
- **Scheduling round.Employees can view schedule**: to allow a user to create/read/update the checkbox value "Employees can view schedule".
- **Scheduling round.Employees can modify schedule**: to allow a user to create/read/update the checkbox value "Employees can modify schedule".
- **Scheduling round.Employees can undo last action**: to allow a user to create/read/modify the checkbox value "Employees can undo last action".
- **Scheduling round.Copy schedule**: to allow a user to create/read/update the checkbox value "Copy schedule".
- **Scheduling round.Do not allow violations**: to allow a user to create/read/update the checkbox value of "Do not allow violations".

Duty groups

Permission category: **Data Entry | Duty group**

- **Duty group**: authorizations on the Duty group actions in the Data management window.
- **Duty group.General**: to allow a user to create/read/update information in the pop-up window **Duty group**.

Users can only read, enter or edit information in the fields in this window if they also have the authorizations for the specific fields/actions:

- **Duty group.Name**: to allow a user to create/read/update the name of a duty group.
- **Duty group.Description**: to allow a user to create/read/update the description value of a duty group.
- **Duty group.Department ID**: to allow a user to create/read/update the department of a duty group.
- **Duty group.Begin time**: to allow a user to create/read/update the begin time of a duty group.
- **Duty group.End time**: to allow a user to create/read/update the end time of a duty group.

Wildcards

Permission category: **ORTEC WS for Windows | Schedule management**

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- **Scheduling period.Max. number of wildcards**: to allow a user to create/read/update the maximum number of wildcards for a given scheduling period in the schedule management window.

2.2.2 Employees

To assign all relevant authorizations to the employees using self scheduling, select all authorizations in the permissions category:

- **ORTEC WS for Employees | Self scheduling**

A detailed overview of the available authorizations for employees is described below. If you already assigned the authorizations mentioned above, then you can skip the detailed description.

Self scheduling

Permission category: **ORTEC WS for Employees | Self scheduling**

- Self scheduling in ESS: to allow users to use self scheduling functionality in ESS (self scheduling tab becomes available in ESS).

(Un)assign duties

Permission category: **ORTEC WS for Employees | Self scheduling**

- Plan duty: to allow a user to select shifts on self scheduling page.
- Undo: to allow a user to undo the action of selecting a shift.

Remarks

Permission category: **ORTEC WS for Employees | Self scheduling**

> ⚠ Only supported in **ESS7**.

- Add request with remark to a day: add or edit a remark/wish to a request on a specific day.
- Remove request with remark on a day: delete remark/wish that was added to a request on a specific day.

Alternatives

Permission category: **ORTEC WS for Employees | Self scheduling**

- Alternatives: to allow a user to use in round 2 of the self scheduling process the functionality Alternatives to show the available alternatives for

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replacement of overstaffed shifts.

Wildcards

Permission category: **ORTEC WS for Employees | Self scheduling**

- Set wildcard: to allow a user to use wildcards on days.
- Set wildcard: to allow a user to use wildcards on shifts.
- Remove wildcard: to allow a user to remove wildcards.

Accounts

Permission category: **ORTEC WS for Employees | Accounts | ESS Accounts**

In order for employees to see the information regarding the hours they need to work in a certain period, the hours already scheduled etc. in ESS, they will also need to have the authorization to read the information on the accounts used in the employee calculations shown in ESS (RUNACC… ESSREAD).

2.3 Points earned by employees

Employees earn points for the shifts that they picked. Usually, more points are earned if employees select less popular shifts. When a scheduling round ends and a new round starts, the points assigned to different shifts can be determined. In the default configuration described here, the points will be calculated at the start of round 2. The amount of points assigned to a shift depends on the (degree of) under- or overstaffing for that shift.

Contact your ORTEC representative when needed.

Example

The planner needs to have at least 5 employees on shift A, preferably 7 and no more than 10.

Different points will be assigned to the shift in the following situations:

Number of employees who added this shift in schedule	Situation	Number of points assigned to shift
less than 5	Understaffing	the most (for example 100)
5 or 6	Semi understaffing	a lot (for example 80)
7	Matching demand	medium (for example 60)
8, 9 or 10	Semi overstaffing	a few (for example 40)
more than 10	Overstaffing	the least (for example 20)

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At the start of round 2, the system determines the situation for each shift (understaffing, overstaffing, etc.) and assigns the associated points to the shifts. For each employee the system calculates the average points per shift.

If employees added a lot of shifts that have overstaffing, they can increase their average points per shift by removing overstaffed shifts from their schedule and adding understaffed shifts.

The points assigned to shifts in the different situations are configured in **ORTEC WS Settings Manager** > **Other settings** tab > **SERVER\SELFROSTERING** folder:

- **POINTSFOREXACTLYSTAFFEDDUTIES**
  The number of points assigned to shifts that match the demand (number of shifts selected = normal demand).
- **POINTSFOROVERSTAFFEDDUTIES**
  The number of points assigned to shifts with overstaffing (number of shifts selected = more than the maximum demand).
- **POINTSFORSEMIOVERSTAFFEDDUTIES**
  The number of points assigned to shifts with semi-overstaffing (number of shifts selected = more than the normal demand, but no more than the maximum demand).
- **POINTSFORSEMIUNDERSTAFFEDDUTIES**
  The number of points assigned to shifts with semi-understaffing (number of shifts selected = less than the normal demand, but no less the minimum demand).
- **POINTSFORUNDERSTAFFEDDUTIES**
  The number of points assigned to shifts with understaffing (number of shifts selected = less than the minimum demand).

2.4 Shift proposal criteria

Shift proposal criteria are used to indicate what shifts will be available on the **Self Scheduling** page in **ESS**. Employees will be able to select these shifts.

In the default configuration, two sets with shift proposal criteria are defined. One for round 1, in which employees are allowed to choose any shift available, provided they are qualified to work the shift and that adding the shift to the schedule doesn't result in labor rule violations. Another set is created for round 2, in which employees can only remove overstaffed shifts from their schedule and they can only add understaffed shifts to their schedule.

Please contact **ORTEC** if the functionality to use shift proposal criteria isn't available in your system.

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2.4.1 Scheduling round 1

For scheduling round 1, the following criteria are included in the shift proposal criteria set called **Self Scheduling Round 1**:

Name	Type	Setting
Skills	Skills	Do not display employees who are not qualified. Do not display.
Violations	Number of violations	Show (disabled). Do not display.

With this configuration, the following shifts will not be available for employees to select in scheduling round 1:

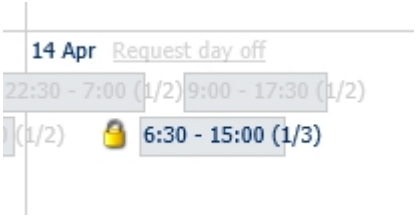
- Shifts that an employee is not qualified for.
- Shifts that cause violations when added to the schedule. These shifts are visible on the Self Scheduling page in ESS, but employees will not be able to select the shifts. If the employee removes already selected shifts from the schedule, it might be possible to add shifts that would first cause violations.

2.4.2 Scheduling round 2

For scheduling round 2, the configuration is dependent of what the user should be able to choose in round 2. There are two main configuration possibilities:

1. Lock the chosen shifts that are equal or less than the demand

The user cannot undo the chosen shifts that are equal or less than the demand. This way the user can only undo shifts that are chosen more than the demand.



For scheduling round 2, the following criteria are included in the shift proposal criteria set called **Self Scheduling Round 2**:

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Name	Type	Setting
Skills	Skills	Do not display employees who are not qualified. Do not display.
Violations	Number of violations	Do not show. Do not display.
Understaffing	Understaffing	Do not show. Do not display.

With this configuration, the following shifts will not be available for employees to select in scheduling round 2:

- Shifts that an employee isn't qualified for.
- Shifts that cause violations when added to the schedule.
- Already overstaffed shifts.

2. Don't lock the chosen shifts

The user is able to undo all shifts that are already chosen. Also the shifts that are equal or less than the demand. This way users are more flexible to undo already chosen shifts.

Name	Type	Setting
Skills	Skills	Do not display employees who are not qualified. Do not display.
Violations	Number of violations	Do not show. Do not display.
Understaffing	Understaffing	Do show. Do display.

With this configuration, the following shifts will not be available for employees to select in scheduling round 2:

- Shifts that an employee is not qualified for.
- Shifts that cause violations when added to the schedule.

If some departments would want to use locks on shifts in round 2 and other departments don't, it's also possible to make different shift proposal criteria with the different options and link these different shift proposal criteria to different departments for round 2. This way, for example two sets could be created: Scheduling R2 (locks) and Scheduling R2 (no locks) with the corresponding options as mentioned above. These different

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proposal criteria can be linked to different departments. How proposal criteria can be linked to scheduling rounds is described in "Setting up scheduling rounds" on page 12.

2.5 Employee calculations

Employee calculations are used to calculate the information regarding working hours, scheduled hours etc. that is presented on the **Self Scheduling** page in **ESS**. The user has to set up accounts to be shown in the user interface via a calculation. The ESS user group needs to have read permissions for the accounts that are used in the background.

In the standard configuration, one set of Employee Calculations is created, called **Self Scheduling**. Fill in the properties code with **Selfrostering**.

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Name	Code[1]	Type	Counts
Points	Points	Shift calculation	Items to be counted: Duty points. Display: average. Do not check display hours in decimals. Period: open period.
Ranking self scheduling points	Ranking	Ranking self scheduling points	Number 1 has the least points. Do not check display hours in decimals. Period: open period.
Scheduled	Scheduled	Balance of account category	Account with the scheduled hours for the open period. Please add hours scheduled as **negative** hours. Do not check display hours in decimals.
BalanceEnd	BalanceEnd	Balance of account category	Account with the balance of hours to work minus the scheduled hours for the period of January 1 until the start of the schedule. Do not check display hours in decimals.
BalanceTill	BalanceTill	Balance of account category	Account with the balance of hours to work for the open period. Hours to work need to be recorded as **positive** hours. Do not check display hours in decimals.
BalanceAnnual	BalanceAnnual	Balance of account category	Account with the balance of hours to work minus the scheduled hours for the period of the year. Do not check display hours in decimals.
WorkingPeriod	workingPeriod	Balance of account category	Account with the balance of hours to work for the open period. Hours to work need to be recorded as **positive** hours. Do not check display hours in decimals.
CustomCalculation1[2]	CustomCalculation1	Balance of account category	Any account category if the result is in time.

2.6 Setting up scheduling rounds

In the **ORTEC WS Web Client**, scheduling rounds can be defined. Scheduling rounds are defined per department and indicate the number of rounds used in the self scheduling process and what actions are allowed in a certain round. In the default configuration 3 scheduling rounds are created.

[1]For the configuration of employee calculations it's important to use the codes **exactly** as shown in the code column, since the configuration of ESS refers to these specific names. Using another **code** as indicated in this column, will cause problems since the calculation will not be found to show in ESS.
2 This custom calculation isn't available in ORTEC WS for Employees (ORTEC WS 7).

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Scheduling rounds are created in the **Data management view** window. If this window is not available, please add the window from the customize menu. It's recommended to place this functionality beneath either the **General** or **Maintenance** menu option.

2.6.1 Properties

Per scheduling round, the following properties are available:

- Name – the name of the scheduling round. This name is visible on the **Self Scheduling** page in **ESS**.
- Description – a description of the scheduling round.
- Configuration key – the key used in the configuration of **Self Scheduling** to identify the scheduling round. Use one of the following configuration keys, since these keys are available in the **ESS** configuration files: Round1, Round2 or Round3.
- Department – the department where the scheduling round will be available.
- Employee calculations – the set of employee calculations that will be used on the **Self Scheduling** page in **ESS** for this scheduling round.
- Shift proposal criteria – the set of shift proposal criteria that will be used to determine what shifts to show on the **Self Scheduling** page in **ESS** for this scheduling round.
- Pin points at start – check this option if points need to be assigned to shifts at the beginning of this round based on the under- and overstaffing of shifts at the start of this scheduling round.
- Employees can view schedule – check this option if the schedule should be available for employees to view in this scheduling round.
- Employees can modify schedule – check this option if the schedule should be available for employees to edit in this scheduling round.
- Employees can undo last action – check this option if employees are allowed to undo their last action. This option is especially relevant in rounds where employees aren't allowed to add overstaffed shifts or to remove understaffed shifts. When this setting is checked and the employee adds an understaffed shift to his schedule, the employee will be able to undo this action for 5 minutes, before the assignment is final.

  > The default undo time of 5 minutes can be adjusted in **ORTEC WS Settings Manager** > **Other settings** tab. Setting: SERVER\SELFROSTERING\UNDOTIME. Default value is 300 (seconds).

- Store a copy of the schedule when the round begins – check this option to store a copy of the schedule when the round starts. This copy will be saved in the database for reporting purposes (no default reports available).
- Show the names of employees that picked a shift or duty group in the hint text – check this option to show names of employees that picked a shift or duty group in the hint text of the **Self Scheduling** page.

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- Do not allow labor rule violations when the round begins – check this option if schedules cannot have labor violations when the round starts. In case the schedule includes labor violations it will not be possible to adjust the scheduling period to this.
- Show number of missing skills - check this option to show number of missing skill requirements during self scheduling.

2.6.2 Standard configuration

In the standard configuration 3 scheduling rounds are defined:

	Scheduling round 1	**Scheduling round 2**	**Scheduling round 3**
Name	Round 1	Round 2	Round 3
Description	Employees enter their schedule.	Employees adjust their schedule.	The planner finalizes the schedule.
Configuration key[1]	Round1	Round2	Round3
Employee calculations	Self Scheduling	Self Scheduling	
Shift proposal criteria	Self Scheduling Round 1	Self Scheduling round 2	
Pin points at start	Unchecked	Checked	Unchecked
Employees can view schedule	Checked	Checked	Unchecked
Employees can modify schedule	Checked	Checked	Unchecked
Employees can undo last action	Unchecked	Checked	Unchecked
Store a copy of the schedule when the round begins	Unchecked	Unchecked	Unchecked[2]
Show the names of employees that picked a shift or duty group in hint text	Checked or unchecked	Checked or unchecked	Unchecked
Show demand	Checked or unchecked	Checked	Unchecked
Do not allow labor rule violations when the round begins	Do not check, show warning or do not allow	Do not check, show warning or do not allow	Do not check, show warning or do not allow

2.6.3 Duty groups

Duty groups are used to show a group of shifts together on the **Self Scheduling** page in **ESS**. All shifts available in your duty set, will be presented to the employees. If you've a lot of shifts and these shifts are all presented as separate shifts in **ESS**, the **Self Scheduling** page will be confusing to your employees. Therefore, you can,

[1]For the configuration of scheduling rounds it is important that you use one of the indicated Configuration keys (without a space) since the configuration of ESS only refers to these specific names.
[2]Check only when building a report.

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for instance, group all shifts that work in the morning together. If an employee wants to work a shift in the morning, he selects the duty group with morning shifts to select a specific shift.

Duty groups are created per department in the window **Data management view**.

Per Duty group the following properties are available:

- **Name** – the name of the duty group, which will also be shown in **ESS** on the **Self Scheduling** page.
- **Description** – a description of the duty group.
- **Department** – the duty group will be available in the selected department.
- **Begin time** – the begin time of the duty group. This time will be presented as start time of the duty group in **ESS** on the **Self Scheduling** page.
- **End time** – the end time of the duty group. This time will be presented as the end time of the duty group in **ESS** on the **Self Scheduling** page.

In the standard configuration the following duty groups are defined.

Name	Times
Early	07:00 – 15:00
Late	15:00 – 23:00
Night	23:00 – 07:00
Special	01:00 – 23:00

Shifts can be assigned to duty groups in the **Shift** window (shifts available in a duty set or in the realization window).

In the **Self Scheduling** page a maximum of 8 available shifts in a duty group can be shown.

2.7 Self scheduling when an employee is ill

It's possible to choose shifts in the **Self Scheduling** page when an employee is ill without a recovery date. When a recovery date exists, it's not possible to choose shifts in the **Self Scheduling** page during the illness period.

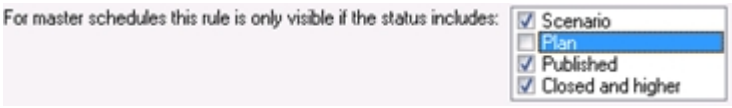
Two labor rules could result in violations when an employee is ill during self scheduling. This could make it impossible to choose shifts for an employee who is ill due to the fact that violations aren't allowed. These rules are:

- Availability for a shift: an employee has to be available for a shift
- Activity classes not allowed during sick leave: shifts with defined activity classes are now allowed when an employee is ill.

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2.7.1 Avoid violations

In order to avoid violations in the schedule as mentioned above, it's possible to switch off the violations of these two rules in schedules with status plan. In the *Maintenance menu*, click *Employment conditions*. Open the active labor time rule set and select the two rules. Now disable the violation for schedule status plan. This way it's possible to use self scheduling during an illness period if the illness period has no end date.



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3 Use self scheduling

- You can use self scheduling for any scheduling period, such as weekly schedules, 4-week schedules, or monthly schedules.
- Employees assigned to multiple departments can create their own schedule for those departments only if all related departments have configured self scheduling.

3.1 Shifts available in ESS self scheduling

Shifts with a duty demand of at least 1 will be available for employees to add to their schedule, provided that these shifts will appear according to the shift proposal criteria used in a specific round.

Shifts can be grouped together by adding a duty group to shifts. Duty groups are presented on the **Self Scheduling** page if more than 1 shift belonging to the duty group is available for the employee to select. If only 1 shift in the duty group is available for an employee, the shift itself will be shown in **ESS**.

Duty group are added to a shift in the duty set window.

1. Go to **Planning** > **Schedule management** > **Duty sets** tab.
2. In the **Maintenance duty sets** section, open the duty set used.
3. From the **Name** drop-down list, select the shift that needs to be added to a duty group.
4. Select the **Description** tab.
5. In the **Duty group** field, select a **Duty group**.

3.2 Start round 1 of the self scheduling process

1. Go to **Planning** > **Schedule management**.
2. Select a scheduling period.
3. In the **Description** field, enter the end date of round 1. This date will be presented as the end date of this scheduling round in **ESS** on the **Self Scheduling** page.

> Keep in mind that this is only a text field to present the end date of a round in **ESS**. You need to manually adjust the scheduling round for the scheduling period to round 2 on the indicated end date in order to end round 1 on this date.

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4. In the **Scheduling round** field, select **Round 1** to start round 1 for this scheduling period.
5. To define the number of available wildcards per employee, enter the **Maximum number of wildcard wishes**.

> Employees can add wildcards to shifts or days off if they don't want the planner to adjust the shift assignment or the day off. The planner determines how many wildcards the employees can use per scheduling period.

3.3 Start round 2 of the self scheduling process

A planner starts a new round and ends the previous round if the field **Scheduling round** is adjusted to the next round for a scheduling period:

1. Go to **Planning** > **Schedule management**.
2. Select a scheduling period.
3. In the **Description** field, enter the end date of round 2. This date will be presented as the end date of this scheduling round in **ESS** on the **Self Scheduling** page.

> Keep in mind that this is only a text field to present the end date of a round in **ESS**. You need to manually adjust the scheduling round for the scheduling period to round 3 on the indicated end date in order to end round 2 on this date.

4. In the **Scheduling round** field, select **Round 2** to start round 2 for this scheduling period.

3.3.1 Considerations

- If the option **Pin points at start** is selected for the round that you assign to a scheduling period, points are assigned to shifts based on under- and overstaffing of the shifts.
- If the option **Store a copy of the schedule when round begins** is checked for a round, a copy of the current schedule will be saved when this round is selected for a scheduling period. This copy is only stored in the database and available for reporting purposes (not available in a system report).
- If the option **Labor rule violations**, **show warning** is checked for a round and labor violations exist in the schedule, a warning is shown when adjusting the round. When the option **Do not allow** is chosen, it's not possible to change the round when violations exist in the schedule. You will need to manually adjust

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the schedule to remove all violations, before you can adjust the round for this scheduling period.

3.4 Start round 3 of the self scheduling process

Adjust the **Scheduling round** to Round 3 to start round 3. Keep in mind that you probably want to change the date entered in the **Description** field as well when changing the round for a scheduling period. When using the default configuration, employees will not be able to see their schedule in round 3. On the **Self Scheduling** page, they will only see the date entered in the description field as the date when the schedule will be published.

In round 3 the planner can adjust the schedule, using all functionality already available in the system. In addition, the following functionality is added specifically to support schedulers to finish the schedule in round 3.

- A new display setting **Overstaffing** to mark overstaffed shifts in the schedule. In the plan board settings, a new display setting is available to show shifts with overstaffing with a green background color or corner color (semi-overstaffed shifts are shown with a light green color).
- A new display setting **Understaffed** to mark understaffed shifts in the schedule.
  In the plan board settings, a new display setting is available to show shifts with understaffing with a red background color or corner color (semi understaffed shifts are shown with a light red color).
- In the shift counters the Under- and Overstaffing will be displayed, compared to the nominal as well as the minimum and maximum demand using different colors.
  - Green for overstaffing
  - Light green for semi-overstaffing
  - Light red for semi-understaffing
  - Red for understaffing
- The new shift proposal criteria **Duty points** can be used to sort employees in the **Candidates for shift** window based on the average number of duty points that employees earned.
- The new employee calculation **ranking self scheduling points** and the adjusted calculation **shift calculation** can be presented in the employee calculation section to inform the planner about the points earned per employee. In addition, the employees in the schedule can be sorted on the number of points earned (Sort employees; sort on calculations).
- A new button **re-apply employee sorting**  in the toolbar to sort employees again after making changes in the schedule.

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After finishing the schedule, the schedule can be published. Published schedules will be visible in **ESS** (on the home page and the personal schedule page).

3.5 Explanation calculation of self scheduling points

The calculation of self scheduling points is shown in round 2. Dependent of the configuration of the number of points, average points are calculated per employee.

Example

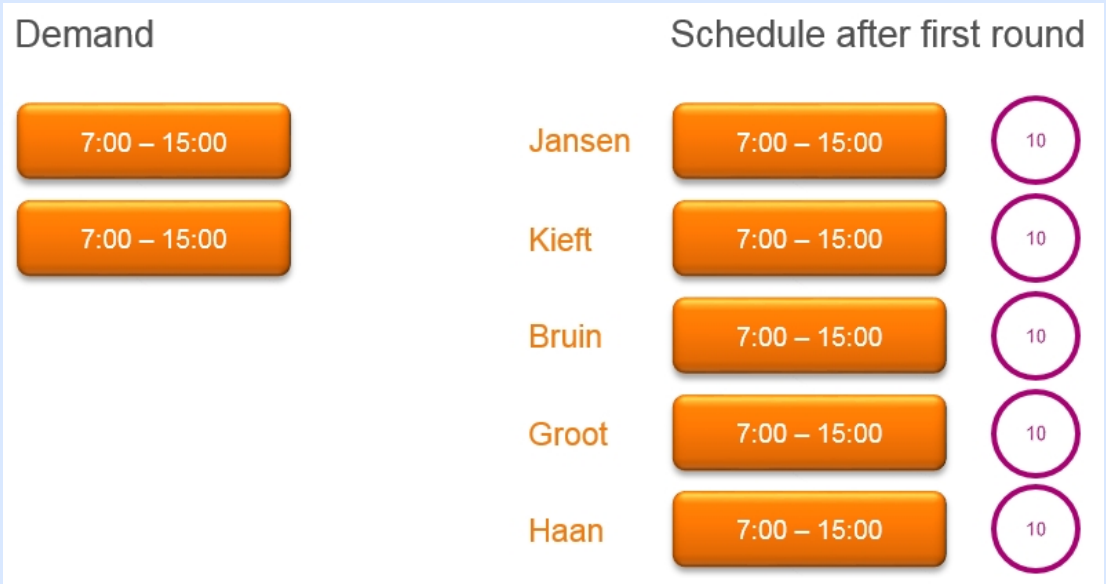
Assume the points are configured as below:

- Points for overstaffed duties: 10
- Points for exactly staffed duties: 20
- Points for understaffed duties: 50

Now the employees can earn more points when they switch from an overstaffed duty to an understaffed duty.

Overstaffed duties

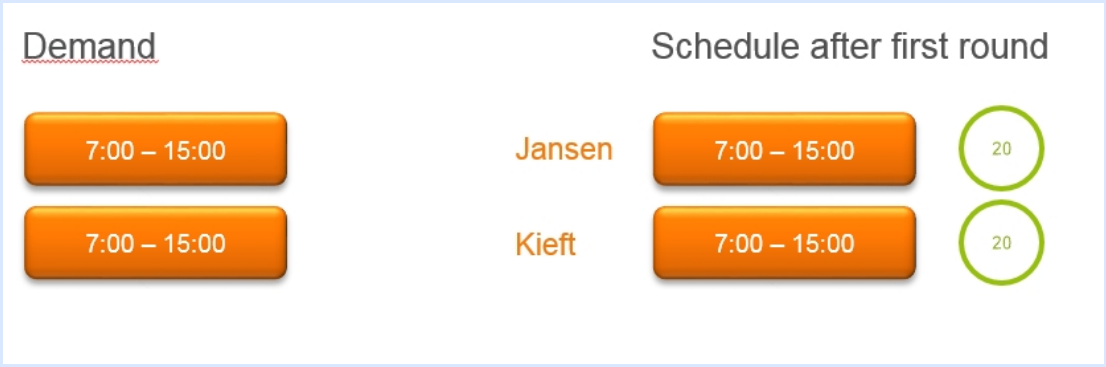
Overstaffed duties are linked to 10 duty points.



Exactly staffed duties

Duties that match the demand are linked to 20 duty points.

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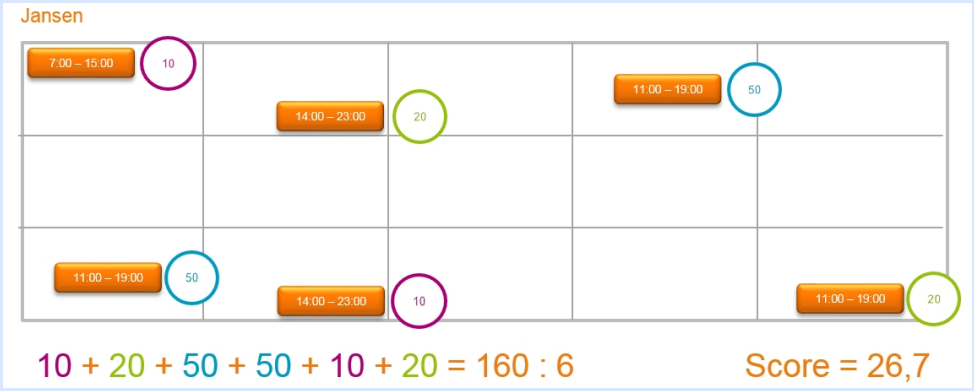
Understaffed duties

Understaffed duties are linked to 50 points.



Average calculation of shifts in round 2:

The number of points is shown in average. This means that the average number of points is influenced when an employee solves a problem in round 2.



In round 3, these average points can be used to determine which employee could solve the remaining scheduling problems.

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Contact information

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