

$$\sum_{n=0}^{\infty} \frac{x^n}{n!}$$

$$\sum_{n=0}^8 \frac{x^n}{n!}$$

ORTEC Workforce for Warehousing

Employee Management



November 2025

e^x

$\frac{1}{\pi}$

$(k!)^4$

π

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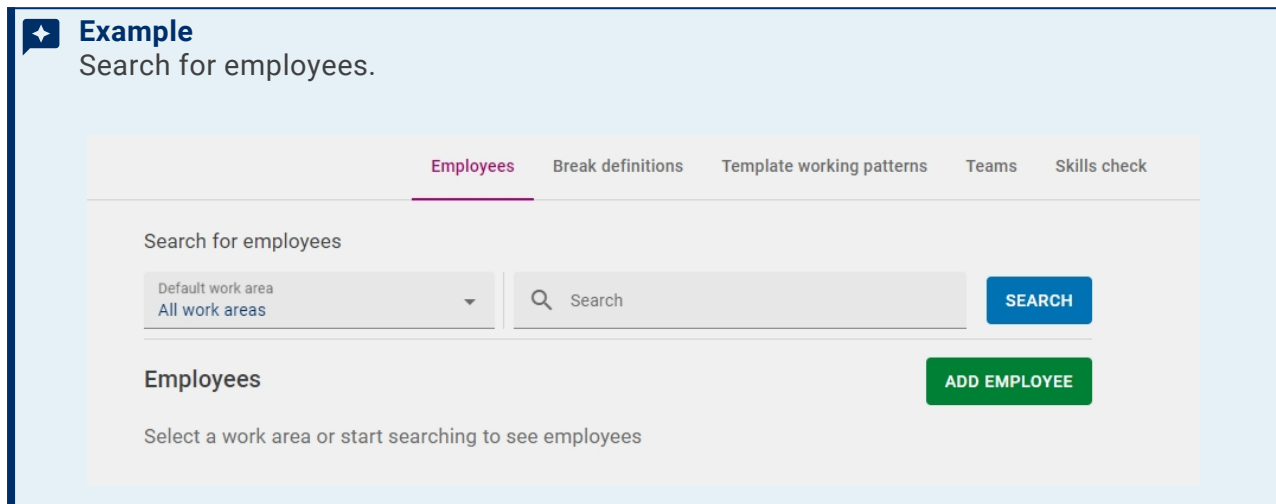
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1 Employee Management

The **Employee Management** application of the **ORTEC Workforce for Warehousing Suite** is typically used by human resources to manage employee data, break definitions, template working patterns and teams. The **"Skills" on page 32** tab is used by team leads to define the skill level per employee.




■ **Employees** tab

Most employee data is imported via an interface with an HR-system such as AFAS. It's also possible to manually add employees.

For each employee you can:

- Add personal information (name and phone number).
- Assign one or more teams.

 First create teams via the **"Teams" on page 26** tab, then assign them to employees.

- Define one or more personal working patterns.
- Assign one or more skills

 Skills are defined in the **Support Manager** application.

- View, edit or add one or more contracts, either client- or temp agency-contracts.

■ **Break definitions** tab

Define the break definitions that can be assigned to template working patterns.

■ **Template working patterns** tab


Define the team shift times that are used in the **Task Scheduling** application.

■ **Teams** tab

Create the teams an employee can be assigned to.


■ **Skills check** tab

Define the skill level per employee.

 Skills and their minimum and maximum skill levels are defined in the **Support Manager** application.


2 Employees

In the **Employee Management** application, the **Employees** tab opens by default. Search for employees, add employees, or edit employee information. Assign teams to employees, define personal working patterns, assign skills and view/add contracts.


 It's not possible to delete employees yet.

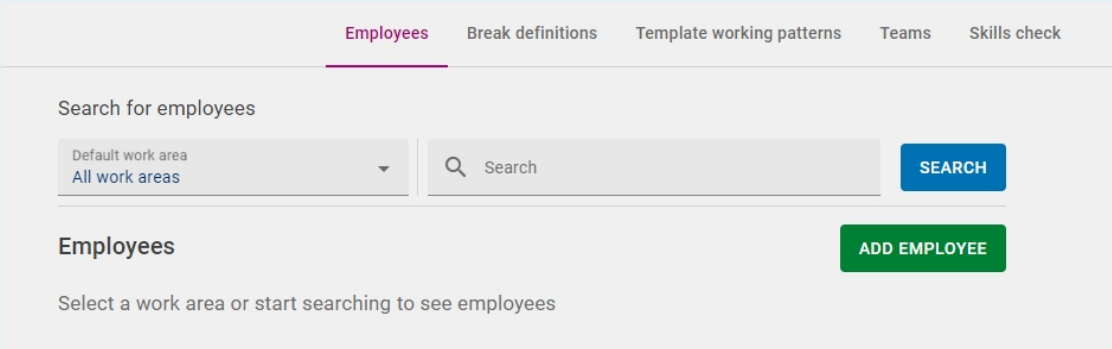
2.1 Search employees

1. Go to the **Employee Management** application > **Employees** tab.

 The **Employees** tab is automatically shown when opening the **Employee Management** application.

2. Select the **Default work area**. You can also use the following options:
 - **All work areas**: Search across all areas.
 - **No default work area**: Search for employees currently not assigned to any area.
3. Enter at least 2 characters that appear in the employee's first name or last name.
4. Click **SEARCH**.
Select the employee from the search results to open the ["Employee information" on page 7](#) page, where you can edit both personal and work-related information of the employee.

 **Example**
Search for employees.



2.2 Add employee

1. Go to the **Employee Management** application > **Employees** tab > **ADD EMPLOYEE** button.
2. Enter the employee's **First name** (optional) and **Last name** (required).
3. Enter the **Phone number** of the employee (optional).

4. Choose the **Site** of the employee (required).



A site is a group of warehouses situated close enough that distribution of employees within the site is physically possible.

Technically speaking, a site functions as the partition key making it easier to distribute data (for example employees) within a site, but more difficult between sites.

5. Click **SAVE, AND SHOW EMPLOYEE**.

In the "Employee information" on page 7 screen you can edit both personal and work-related information of the employee.



Example

Add employee.


The screenshot displays the 'Employees' management interface. At the top, there are navigation tabs: 'Employees', 'Template working patterns', 'Teams', and 'Skills check'. Below the tabs, there is a search section with a dropdown menu for 'Default work area' (set to 'All work areas') and a search input field with a 'SEARCH' button. The main content area is titled 'Employees' and contains the text 'Select a work area or start searching to see employees'. A green 'ADD EMPLOYEE' button is visible in the top right corner. A modal form titled 'Add employee' is open in the center, featuring the following fields: 'First name', 'Last name (required) *', 'Phone number', and 'Site (required) *' (a dropdown menu). At the bottom of the modal, there are two buttons: 'CANCEL' and 'SAVE, AND SHOW EMPLOYEE'.

2.3 Employee information

Edit personal and/or work-related employee information.

2.3.1 Edit employee information


1. Go to the **Employee Management** application > **Employees** tab.

 The **Employees** tab is automatically shown when opening the **Employee Management** application.

2. "[Search employees](#)" on page 6 and select an employee entry, or "[Add employee](#)" on page 6.
3. In the personal **Employee information** page of an employee, you can:
 - Edit personal employee information
 - Add teams

 Teams are defined first via the **Employee Management** application > "[Teams](#)" on page 26 tab.

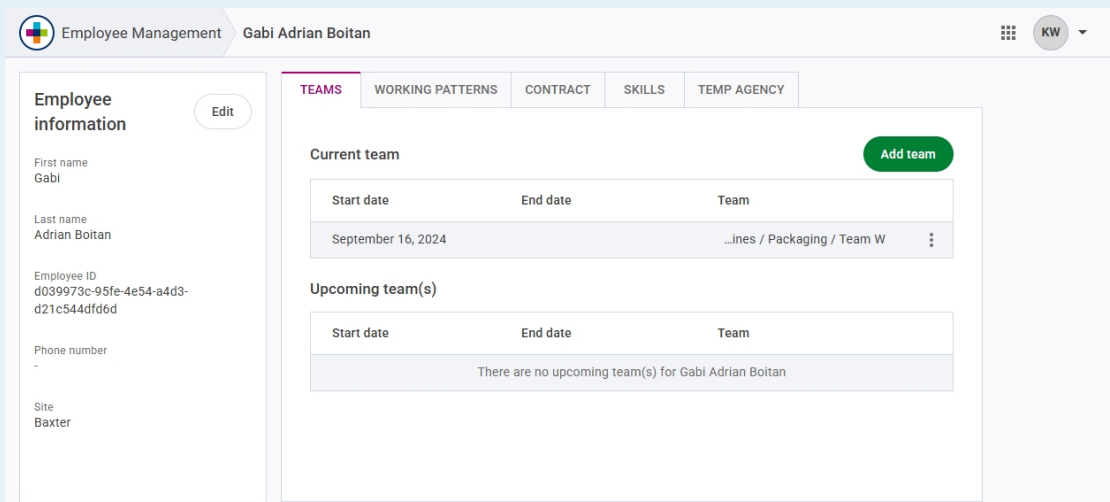
- Add working patterns
- Add skills

 Skills are defined first on site level via the **Support Manager** application > **Manage sites** tab.
Select a site > click **ADD SKILL**.

- View/add contracts of the client
- View/add contracts of the temp agency

Example

Employee information page.




The screenshot displays the 'Employee Management' application interface for the employee 'Gabi Adrian Boitan'. The page is titled 'Employee information' and includes an 'Edit' button. The left sidebar shows personal details: First name (Gabi), Last name (Adrian Boitan), Employee ID (d039973c-95fe-4e54-a4d3-d21c544dfd6d), Phone number (-), and Site (Baxter). The main content area has tabs for 'TEAMS', 'WORKING PATTERNS', 'CONTRACT', 'SKILLS', and 'TEMP AGENCY'. The 'TEAMS' tab is selected, showing a 'Current team' section with a table and an 'Add team' button. The table has columns for 'Start date', 'End date', and 'Team'. The current team entry shows a start date of 'September 16, 2024' and a team name of '...ines / Packaging / Team W'. Below this is an 'Upcoming team(s)' section with a message: 'There are no upcoming team(s) for Gabi Adrian Boitan'.

2.3.2 Personal information

View and edit personal information of each employee.

Edit personal information

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. In the upper-right corner of the **Employee information** pane, click **EDIT**.
4. Edit the **First name**, **Last name** and/or **Phone number** of the employee. The **Site** can't be changed.
5. Click **SAVE**.

 **Tip:** Click the blue underlined phone number to call the employee.


2.3.3 Teams

Assign one or more teams to an employee.

 First create teams via the **Employee Management** application > "**Teams**" on page 26 tab.


View team assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Click the **TEAMS** tab to view the current, upcoming, and prior teams of this employee. The **Team** field consists of three parts: Warehouse / Area / Team.


 **Example**

View team assignment.

Current team **ADD TEAM**

Start date	End date	Team
November 7, 2022	November 14, 2022	...se X / Area A / Team One 

Upcoming team(s)


Start date	End date	Team
November 21, 2022	November 28, 2022	...se X / Area A / Team One 

Prior team(s)

Start date	End date	Team
October 10, 2022	October 17, 2022	...use X / Area A / Team One

Add team assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Go to the **TEAMS** tab > **ADD TEAM** button.
4. Choose the **Start date** of the team assignment. The **End date** is optional.
5. Choose the **Team**.

 The application guarantees that there are no overlapping assignments for an employee. When the start or end date of a new assignment conflicts with existing assignments, there are two possible scenarios:

- Existing assignments will be shortened or overwritten, when the new assignment is for a different team.
- Existing assignments will be merged with the new assignment, when the new assignment is for the same team.

Edit or delete team assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Find the team of interest on the **TEAMS** tab.
4. Click the kebab menu (the three vertical dots menu) at the rightmost end of the team entry.
5. Select **Edit team** or **Delete team** as needed.


 You can't edit or delete a prior assignment.

2.3.4 Working patterns

Assign one or more template or personal working patterns to an employee. Personal working patterns and template working patterns can rotate over a maximum of 12 weeks.

Example

Parental leave each Friday or working less hours every day due to a back injury.

 First make sure the employee is assigned to a team via the **Employee Management** application > **Employees** tab > **TEAMS** tab.

Add template working pattern

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Click the **WORKING PATTERNS** tab.
4. Select the **Add template working pattern** button.
5. Choose the **Start date** (required) and the **End date** (optional).
6. Select the **Template working pattern**.

7. Select when to start via the **Start in week** dropdown list.
8. Click **Save**.

Add personal working pattern

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Click the **WORKING PATTERNS** tab.
4. Select the arrow within the **Add template working pattern** button to select **Add personal working pattern**.
5. In the top-left corner, choose the **Start date** (required) and the **End date** (optional).



Automatically, the **Team working pattern** to which this employee has been assigned is displayed in gray. This makes it easier to add the personal working pattern while taking into account the team working pattern. The **Period duration** is shown in the top-right corner.

On this page you can only define the personal working pattern, displayed in purple. The team working pattern is defined via the "[Teams](#)" on page 26 tab.

6. Select **Yes** or **No** to define whether this employee is recovering from illness or injury in this period (required).
7. Define the personal work intervals.

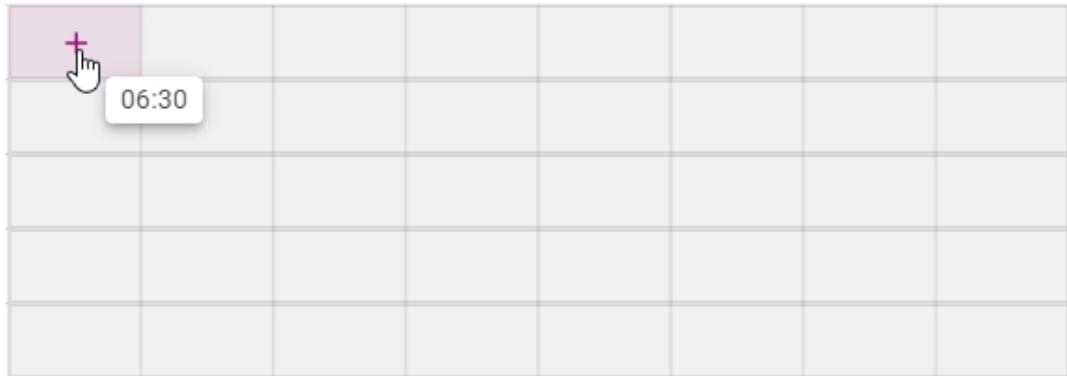


- Only one interval may start each day.
- The minimum length of an interval is 4 hours, the maximum length is 12 hours.
- Adjacent intervals on one day will be merged.
An interval ending at 00:00 and another one starting at 00:00 the next day, will be merged too.
- It's not possible to have multiple non-adjacent intervals on one day.

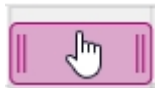


Tip: Select the **RESET TO TEAM PATTERN** button.
This will add the personal working pattern on top of the team working pattern.
Select one or more intervals to edit or delete them.
You can also drag entire personal work interval blocks.

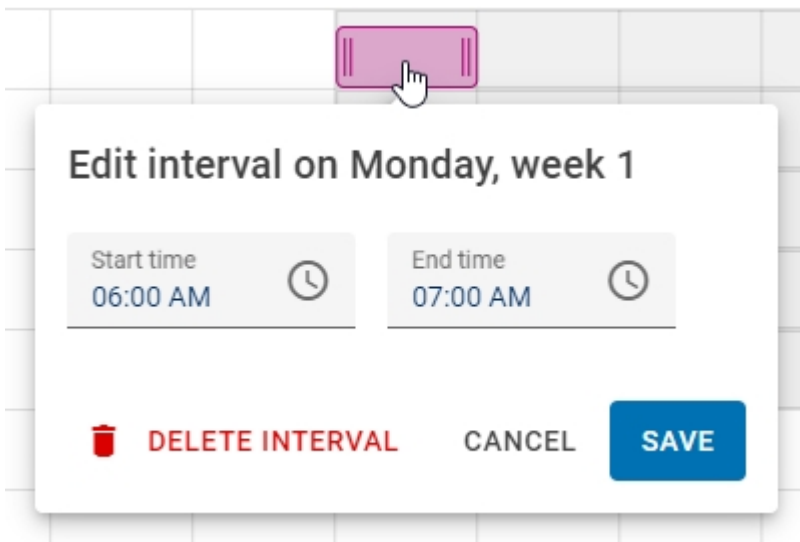
- a. Alternatively, hover with your mouse above a work interval and select it.



- b. Click again.



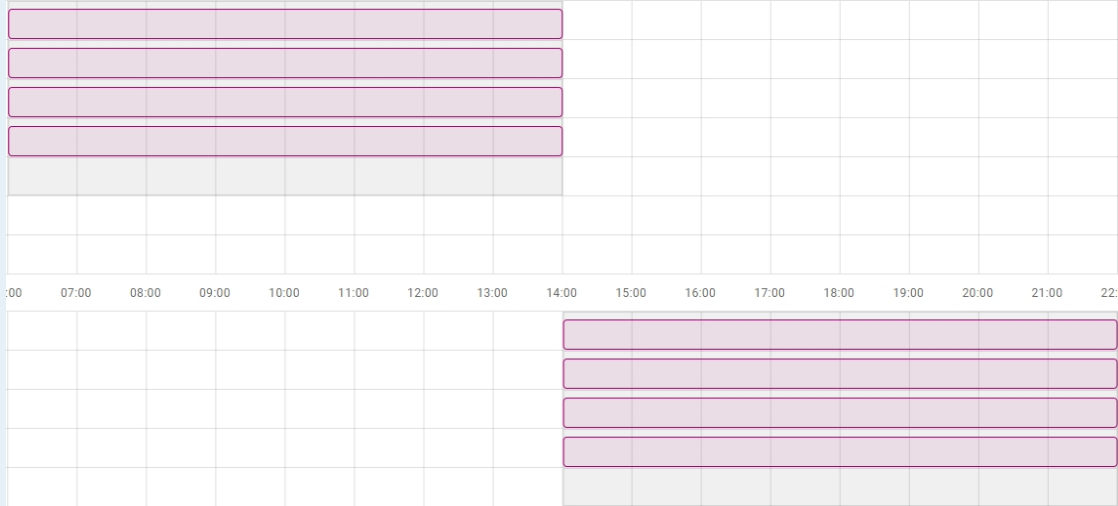
- c. Edit the **Start time** and **End time**. Click **SAVE**.



- d. Repeat when needed.
8. Click **SAVE**.

Example

With a parental leave each Friday, the personal working pattern could look this this:



Edit or delete working pattern

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Click the **WORKING PATTERNS** tab.
4. Find the pattern of interest.
5. Click the kebab menu (the three vertical dots menu) at the rightmost end of the pattern entry.
6. Select **Edit** or **Delete**.

Warnings

Warnings appear when:

- A personal working pattern falls outside the template working pattern. This can happen during or after adding a personal working pattern. For example, when a template working pattern is updated, the personal working pattern might fall outside the new scope.
- A personal working pattern overlaps with multiple template working patterns. For example, when an employee switches from team A to team B the personal working pattern might overlap with two different template working patterns. That's not possible and a warning will appear.

The solution is to adjust the personal working pattern so it falls inside or on top of the template working pattern (displayed in gray).

Example

! The interval of this pattern is outside the team assignment from 1 Oct 2022 until 30 Nov 2022. Please select an interval that is entirely inside a team assignment.

2.3.5 Contract

View and/or add employee-client contracts.

Contracts determine whether an employee is currently employed by the client. A contract also holds the number of weekly contract hours. With an active contract an employee will be available in the **Task Scheduling** application.

View contract assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **CONTRACT** tab to see the current, upcoming, and recently ended contracts.

Add contract

To add a contract to an employee:

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **CONTRACT** tab, click **ADD CONTRACT**.
4. Choose the **Start date** of the contract. The **End date** is optional.
5. Fill in the **Contract hours** and the **Type** of contract. Both fields are optional.

Example

A contract type can be, for example, full-time, part-time or temporary.

Current contract				ADD CONTRACT
Start date	End date	Contract hours	Type	
June 6, 2022		38	Full-time	⋮

Upcoming contract(s)			
Start date	End date	Contract hours	Type
There are no upcoming contract(s) for [redacted]			

6. Click **SAVE**.



The application guarantees that there are no overlapping assignments for an employee. When the start or end date of a new assignment conflicts with existing assignments, there are two possible scenarios:

- Existing assignments will be shortened or overwritten, when the new assignment extends the scope of existing assignments.
- Existing assignments will be merged with the new assignment, when the new assignment falls within existing assignments.

Edit or delete contract

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **CONTRACT** tab.
4. Find the contract of interest.
5. Click the kebab menu (the three vertical dots menu) at the rightmost end of the assignment entry.
6. Select **Edit contract** or **Delete contract** as needed.
Deleting or shortening a contract assignment has no impact on existing assignments.



You can't edit or delete a prior assignment.

2.3.6 Skills

View, add or delete skill assignments to employees.



Skills are defined on site level via the **Support Manager** application > **Manage sites** tab. Select a site and click **ADD SKILL**.

You can only edit a skill in the **Support Manager** application.

View skill assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **SKILLS** tab to view the current, upcoming, and prior skill assignments.

Example
View skill assignments.

ADD SKILL ASSIGNMENT

Skill name	Level	Area name	Start date	End date
Teams Skill	3	Teams Warehouse / Area Name	February 21, 2022	February 28, 2022

Upcoming skill assignment(s)

Skill name	Level	Area name	Start date	End date
Teams Skill	3	Teams Warehouse / Area Name	March 21, 2022	March 22, 2022
Teams Skill	5	Teams Warehouse / Area Name	March 23, 2022	March 31, 2022

Prior skill assignment(s)

Skill name	Level	Area name	Start date	End date
Teams Skill	1	Teams Warehouse / Area Name	February 14, 2022	February 17, 2022

Add skill assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **SKILLS** tab.
4. Click **ADD SKILL ASSIGNMENT**.

Example
Add skill assignment.

Select skills

Please select one or more skills to assign to a specific area, or all applicable areas at a site.

Skills ▼

Experience levels:

Select a skill first to define an experience level

Select areas

Please select a skill first

Define period

Please select the period in which the skill assignments should be valid.

Start date 📅

End date (optional) 📅

There are no areas selected yet

SAVE

5. Select skills.
 - Once you selected a skill, the Select areas pane will be populated with a list of applicable areas.
 - If you selected multiple skills, the application will assign the skills to all applicable areas at the site.
6. Select the experience levels of the skills.



The minimum and maximum experience levels are set in the **Support Manager** application.

7. Select areas.
8. Define the start date of the assignment. The end date is optional.
9. Click **SAVE**.



The application guarantees that there are no overlapping assignments for an employee. When the start or end date of a new assignment conflicts with existing assignments, there are two possible scenarios:

- Existing assignments will be shortened or overwritten, when the new assignment is for a different skill and skill level.
- Existing assignments will be merged with the new assignment, when the new assignment is for the same skill and skill level.

Delete skill assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **SKILLS** tab.
4. Find the skill of interest.
5. Click the kebab menu (the three vertical dots menu) at the rightmost end of the skill entry.
6. Select **Delete skill assignment**.

2.3.7 Temp agency

View and/or add employee-temp agency contracts.

Temp agency employees can be assigned to multiple temp agencies. A temp assignment allows a temp agency to plan an agency employee.

View temp agency assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **TEMP AGENCY** tab to see the current, upcoming, and recently ended assignments.

Example
View temp agency assignment.

Current temp agency ADD TEMP AGENCY

Start date	End date	
February 21, 2022	March 11, 2022	⋮

Upcoming temp agencies

Start date	End date	
March 14, 2022	March 17, 2022	⋮
March 21, 2022	April 14, 2022	⋮

Prior temp agencies

Start date	End date
February 6, 2022	February 11, 2022

Add temp agency assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Click the **TEMP AGENCY** tab > **ADD TEMP AGENCY** button.

Example
Add temp agency assignment.


Add temp agency ×

Start date * 📅	End date (optional) 📅	Temp agency * ▼	Type
---	--	--	------

CANCEL
SAVE

4. Choose the **Start date** of the assignment. The **End date** is optional.

5. Select a **Temp agency**.

 One or more temp agencies have been defined via the **Support Manager** application > **Manage sites** tile. Add or select a site, and select the **TEMP AGENCIES** tab.

6. (Optional) Fill in the **Type** of work associated with this assignment.
7. Click **SAVE**.
The application guarantees that there are no overlapping assignments for an employee.


Edit or delete temp agency assignment

1. Go to the **Employee Management** application > **Employees** tab.
2. Search for and select an employee or add a new employee.
3. Select the **TEMP AGENCY** tab.
4. Find the temp agency assignment of interest.
5. Click the kebab menu (the three vertical dots menu) at the rightmost end of the assignment entry.
6. Select **Edit temp agency** or **Delete temp agency** as needed.

 You can't edit or delete a prior assignment.

2.4 Skills

In the **Employee Management** application, assign skill levels to employees. The skill or experience level of an employee is represented by a number. Skill levels are manually updated by a team lead on, for example, a weekly basis.

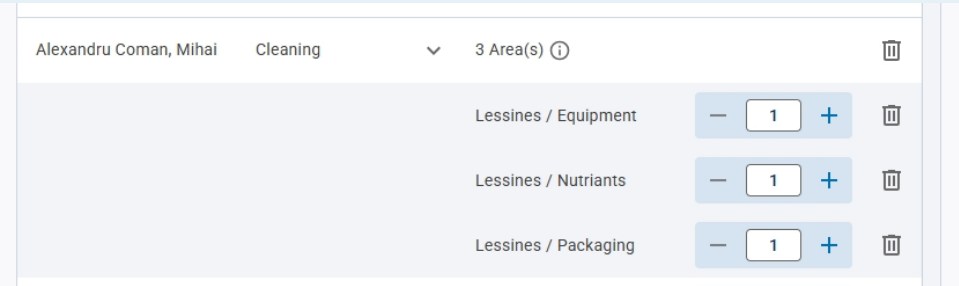
 Make sure skills and their experience levels are defined in the **Support Manager** application. Then, in the **Employee Management** application, assign "[Skills](#)" on page 15 to individual employees. You can only adjust the skill level of an employee when a skill has been assigned first.
Please contact your application manager when you've not enough permissions.

2.4.1 Manage skills and skill levels

1. Go to the **Employee Management** application > **Skills** tab.
2. Select an **Area** and a **Team**.
3. Adjust, per employee, the **Skill level** with the plus and minus signs.
Changes are saved automatically.

- View all areas where a skill is needed by hovering with your mouse above the ⓘ sign.
- Ungroup similar skills and manage the skill levels separately.

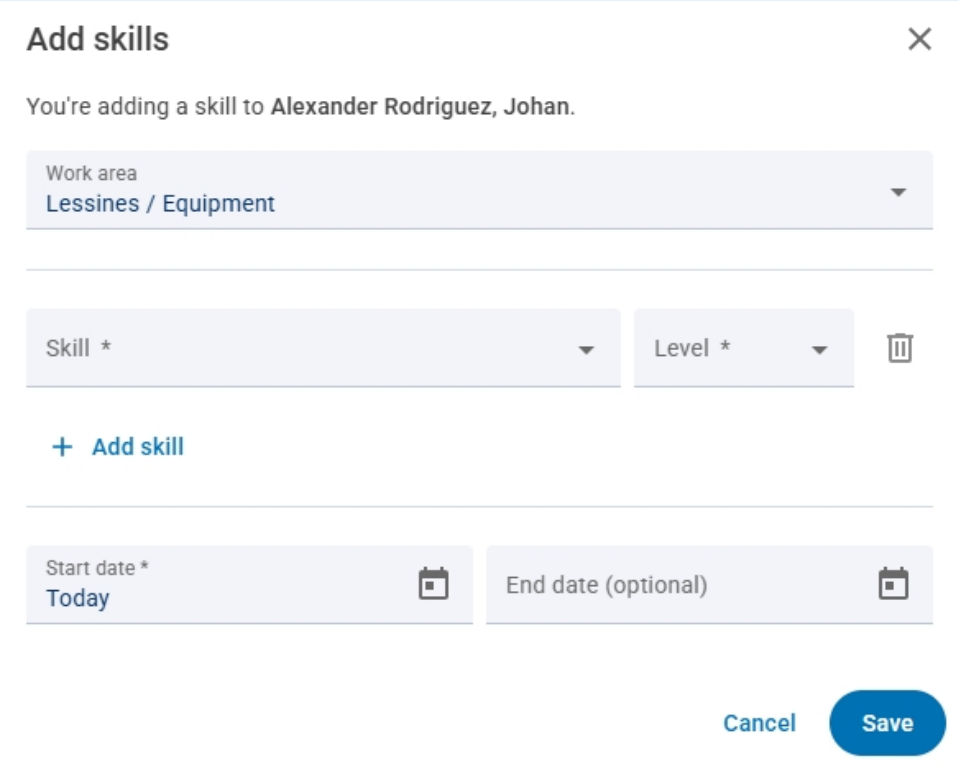
Example
Select the arrow to ungroup similar task and manage the skill levels separately.



Employee	Work Area	Grouped Skill	Level	Action
Alexandru Coman, Mihai	Cleaning	3 Area(s) ⓘ		Trash
		Lessines / Equipment	1	Trash
		Lessines / Nutriants	1	Trash
		Lessines / Packaging	1	Trash

- Select the garbage icon behind a skill to delete it.
- Select **+ Add skills** to add one or more skills to an employee. Make sure the correct **Work area** is selected and choose a **Skill** and **Level**. By default the current day is defined as the start date. It's not necessary to define an end date. Select **+ Add skill** to add more.

Example



Add skills [Close]

You're adding a skill to Alexander Rodriguez, Johan.

Work area
Lessines / Equipment

Skill * [Dropdown] Level * [Dropdown] [Trash]

+ Add skill

Start date * [Today] [Calendar] End date (optional) [Calendar]

Cancel **Save**

- The skill level cannot be adjusted, when the minimum and maximum experience level of a skill - defined in the **Support Manager** application - is the same.

3 Break definitions

In the **Employee Management** application, view and add break definitions via the **Break definitions** tab. Break definitions are created and stored on the site level and can be assigned to Template working patterns. One break definition can be assigned to multiple template working patterns.

A break definition consists of a name and one or more breaks. Each break has a start and end time, along with a duration. For instance, the 'Early double break' pattern has two breaks: one within a window from 08:00 to 10:00 lasting 30 minutes, and another within a window from 11:00 to 13:00 lasting 30 minutes.

In Staffing, break durations are factored into both horizontal and vertical calculations. Working time balance is computed as shift duration minus break duration. Similarly, in vertical calculations, the duration of the shift minus breaks determines the contribution to skill demand.

When shifts are rolled out, breaks are included, but only if the break window fully falls within the employee's working pattern. For instance, if the employee has a personal pattern from 06:00 to 12:00, the second break of the example above would not apply.

In **Task Scheduling**, breaks are planned by the optimizer and assigned specific times based on defined break windows. For example, breaks might be scheduled from 9:00 to 9:30 and 12:30 to 13:00. These breaks are then factored into workload calculations for shifts.

3.1 Add break definition

1. Go to the **Employee Management** application > **Break definitions** tab > **ADD BREAK DEFINITION** button.
2. Enter the break definition details, including:
 - **Name**
 - **Break window:** Start time and End time. Within this window the break must be scheduled.
 - **Break duration:** From minimum 5 to maximum 60 minutes
3. (Optional) To add another break definition, select **+ ADD BREAK**. This is possible up to a max of 3 breaks.

Example

The pattern 'Early double break' consists of 2 breaks. The first has a window of 08:00 to 10:00 with a duration of 00:30, meaning a break of 30 minutes must be planned within that time window, and a second window of 11:00 to 13:00 with a duration of 00:30.

4. Click **SAVE**.



The break definition can be added to a template working pattern and to each interval defined there.

3.2 Edit or delete break definition

1. Go to the **Employee Management** application > **Break definitions** tab.
2. Find the break definition of interest in the **Break definitions** pane.
3. Click the kebab menu (the three vertical dots menu) at the rightmost end of the break definition entry.
 - To edit, select **Edit break definition**. Make the required changes and click **SAVE**.
 - To delete, select **Delete break definition**. Confirm by clicking **DELETE**.


4 Template working patterns

In the **Employee Management** application, view and add team shift patterns via the **Template working patterns** tab. Template working patterns are created and stored on the site level and can be assigned to "Teams" on page 26. One template working pattern can be assigned to multiple teams. Template working patterns can rotate over a maximum of 12 weeks.


4.1 Search template working patterns

1. Go to the **Employee Management** application > **Template working patterns** tab.
2. In the search box, enter at least one character that appears either in the pattern's **Name** or in the **Description**.

The result list with matching patterns is updated automatically.

 **Example**
Template working patterns.

Search for patterns

Search 

ADD TEMPLATE WORK PATTERN

Patterns matching 'shift'

Select a pattern to see or edit more details


Name	Length	Description
3 hour shifts	1 week	
EarlyDay	2 weeks	This pattern describes the Early and Day sh...
EarlyLate	2 weeks	This pattern described the early and late sh...
NIGHT Shift TEST	1 week	check backend
Night	1 week	This pattern describes the night shift
VSD	1 week	this pattern describes the VSD (weekend w...

4.2 Add template working pattern

1. Go to the **Employee Management** application > **Template working patterns** tab > **Add template working pattern** button.
2. Enter template details, including:

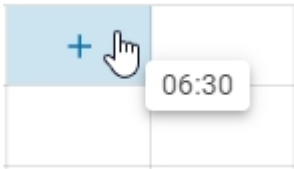
- **Template name**
- **Pattern duration:** 1 week, 2 weeks, or n weeks (up to a maximum of 12 weeks)
- **Description**

3. Define work patterns by specifying work intervals.

 Only one interval may start each day.

- The minimum length of an interval is 4 hours, the maximum length is 12 hours.
- Adjacent intervals on one day will be merged. An interval ending at 00:00 and another one starting at 00:00 the next day, will be merged too.
- It's not possible to have multiple non-adjacent intervals on one day.

a. Hover with your mouse above a work interval and select it.





b. Click again.





c. Edit the **Start time**, **End time**, and **Break definition**. Click **SAVE**.

Edit interval on Monday, week 1

Start time * 06:00 AM 

End time * 07:00 AM 

Break definition 

 **DELETE INTERVAL** **CANCEL** **SAVE**

d. Repeat when needed.

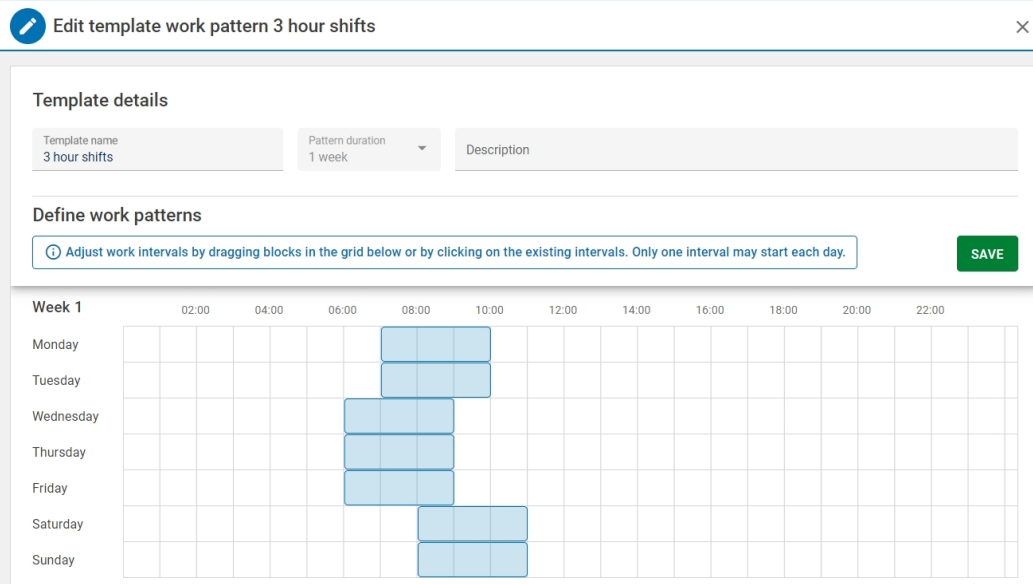
4. Click **Save**.

4.3 Edit template working pattern

1. Go to the **Employee Management** application > **Template working patterns** tab.
2. Find the pattern of interest in the **Patterns** pane. You can also "[Search template working patterns](#)" on page 23.
3. Click the kebab menu (the three vertical dots menu) at the rightmost end of the pattern entry.
4. Select **Edit Template working pattern**.
You can change the **Template name**, **Description**, and work intervals, but not the **Pattern duration**.

Example

Edit template working pattern. Select a work interval to edit the **Start time**, **End time**, and/or **Break definition**.



The screenshot shows a dialog box titled "Edit template work pattern 3 hour shifts". It has a close button (X) in the top right. Under "Template details", there are three input fields: "Template name" with the value "3 hour shifts", "Pattern duration" with a dropdown menu showing "1 week", and "Description". Below this is the "Define work patterns" section, which includes a text box with instructions: "Adjust work intervals by dragging blocks in the grid below or by clicking on the existing intervals. Only one interval may start each day." and a green "SAVE" button. The grid shows "Week 1" with columns for time intervals from 02:00 to 22:00 in 2-hour increments. Rows represent days of the week. Blue blocks indicate work intervals: Monday (08:00-10:00), Tuesday (08:00-10:00), Wednesday (06:00-08:00), Thursday (06:00-08:00), Friday (06:00-08:00), Saturday (08:00-10:00), and Sunday (08:00-10:00).

5. Click **SAVE**.

4.4 Delete template working pattern

1. Go to the **Employee Management** application > **Template working patterns** tab.
2. Find the pattern of interest in the **Patterns** pane. You can also "[Search template working patterns](#)" on page 23.
3. Click the kebab menu (the three vertical dots menu) at the rightmost end of the pattern entry.
4. Select **Delete Template work pattern**.
You'll be prompted to confirm the deletion.



A deleted pattern can't be restored.

5 Teams

In the **Employee Management** application, view and add teams via the **Teams** tab.

Add a work area and a template working pattern to each team.

Once teams are defined, group employees in those teams via the **Employees** tab.



When defining teams, make sure the following steps have been completed first:

1. Work areas are defined in the **Support Manager** application. Work areas are part of warehouses, which are also defined in the **Support Manager** application. Please contact your application manager when you've not enough permissions.
2. "[Template working patterns](#)" on [page 23](#) are defined via the **Employee Management** application > **Template working patterns** tab.



It's not possible to delete teams yet.

5.1 Search for teams

1. Go to the **Employee Management** application > **Teams** tab.
2. In the search box, enter at least one character that appears either in the team's **Name** or **Work area**.

The result list with matching teams is updated automatically.

Example
Search for teams.

Search for teams

Search
ea

ADD TEAM

Teams matching 'ea'

Select a team to see or edit more details

Name	Work area
Early TEam	Warehouse 1 / Inventory
Early TEam	Warehouse 1 / Shipping
Early TEam	Warehouse 1 / Receiving
Evening Team	Warehouse 1 / Inventory
Evening Team	Warehouse 1 / Shipping
Evening Team	Warehouse 1 / Receiving
Mid Day Team	Warehouse 1 / Inventory
Mid Day Team	Warehouse 1 / Shipping
Mid Day Team	Warehouse 1 / Receiving

5.2 Add team

1. In the **Employee Management** application > **Teams** tab, click **ADD TEAM**.
2. Enter a **Team name** and select its **Work area**.
3. Optionally, enter the **External info reference** and the **External info url**.




The **External info reference** should be equal to the team code used in the HR-system. This makes it possible to link employees via an interface to the correct team.

Not supported in current implementation: The **External info url** should be equal to a specific page inside the HR-system. This makes it possible to navigate to the HR-system and create or edit teams.

4. Click **SAVE, AND SHOW TEAM**.
In the **Team information** screen you can edit the team information and add a template working pattern.


5.3 Team information

Edit team information and/or add, edit or delete template working patterns.

 Template working patterns have been defined earlier in the **Employee Management** application > **Template working patterns** tab.


5.3.1 Edit team information

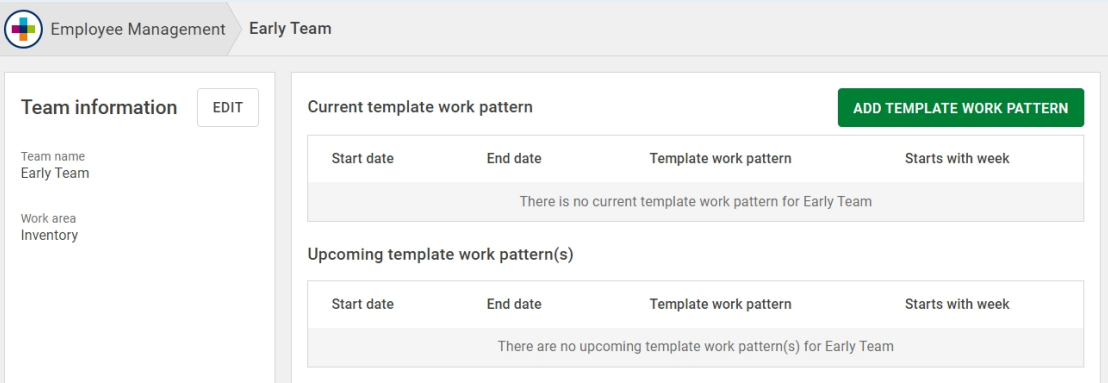
1. Go to the **Employee Management** application > **Teams** tab.
2. Search for and select a team or add a new team.
3. In the upper-right corner of the **Team information** pane, click **EDIT**.
4. Edit the **Team name**, **External info reference** and/or **External info url**.

 The **External info reference** should be equal to the team code used in the HR-system. This makes it possible to link employees via an interface to the correct team.

Not supported in current implementation: The **External info url** should be equal to a specific page inside the HR-system. This makes it possible to navigate to the HR-system and create or edit teams.

5. Click **SAVE**.

 **Example**
Edit team information.



The screenshot shows the 'Employee Management' application with the 'Early Team' selected. The 'Team information' pane on the left shows 'Team name: Early Team' and 'Work area: Inventory', with an 'EDIT' button. The main area displays 'Current template work pattern' and 'Upcoming template work pattern(s)' sections, both showing 'There is no current template work pattern for Early Team' and 'There are no upcoming template work pattern(s) for Early Team'. An 'ADD TEMPLATE WORK PATTERN' button is visible in the top right of the main area.

5.3.2 Template working pattern

View and/or assign "[Template working patterns](#)" on [page 23](#) to a team. You can also edit or delete a template working pattern.

View template working pattern

1. Go to the **Employee Management** application > **Teams** tab.
2. Search for and select a team or add a new team.
All the current and upcoming working pattern assignments are listed next to the **Team information** pane.

Example

View template working pattern.

Current template working pattern Add template working pattern

Start date	End date	Template working pattern	Starts with week
September 16, 20...		Day	week 2 ⋮

Upcoming template working pattern(s)

Start date	End date	Template working pattern	Starts with week
There are no upcoming template working pattern(s) for Team B			

Assign template working pattern

1. Go to the **Employee Management** application > **Teams** tab.
2. Search for and select a team or add a new team.
3. Select **Add template working pattern**.

Add template working pattern ×


Start date 📅 End date (optional) 📅

Template working pattern ▾ Start in week ▾


CANCEL **SAVE**

4. Specify the **Start date**. The **End date** is optional.

5. Select a **Template working pattern** from the drop-down list.

 Template working patterns have been created via the **Employee Management** application > **Template working patterns** tab > **Add template working pattern** button.

6. Select the starting week.
Please view the "[Example use case](#)" on page 30 to understand why.
7. Click **Save**.

 The application guarantees that there are no overlapping assignments for an employee. When the start or end date of a new assignment conflicts with existing assignments, there are two possible scenarios:

- Existing assignments will be shortened or overwritten, when the new assignment extends the scope of existing assignments.
- Existing assignments will be merged with the new assignment, when the new assignment falls within existing assignments.

Edit or delete template working pattern

1. Go to the **Employee Management** application > **Teams** tab.
2. Search for and select a team or add a new team.
3. Find the work pattern of interest.
4. Click the kebab menu (the three vertical dots menu) at the rightmost end of the assignment entry.
5. Select **Edit template working pattern** or **Delete template working pattern** as needed.

Example use case

In the example below, the planner defines a working pattern with a 2-week duration and assigns it to two teams:

- Team A: starts in week 1
- Team B: starts in week 2

Such an arrangement allows Team B to work a mirror pattern of Team A.

e^x

$\frac{1}{\pi}$

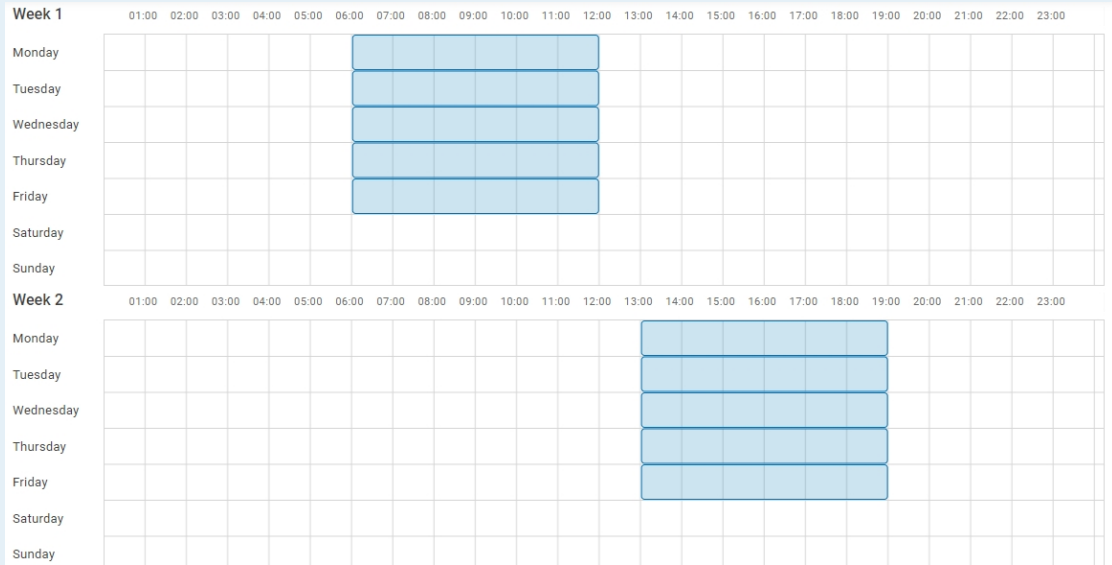
$(k!)^4$

π



Example

2-week working pattern.



6 Skills

In the **Employee Management** application, assign skill levels to employees. The skill or experience level of an employee is represented by a number. Skill levels are manually updated by a team lead on, for example, a weekly basis.

⚠ Make sure skills and their experience levels are defined in the **Support Manager** application. Then, in the **Employee Management** application, assign "Skills" on page 15 to individual employees. You can only adjust the skill level of an employee when a skill has been assigned first. Please contact your application manager when you've not enough permissions.

6.1 Manage skills and skill levels

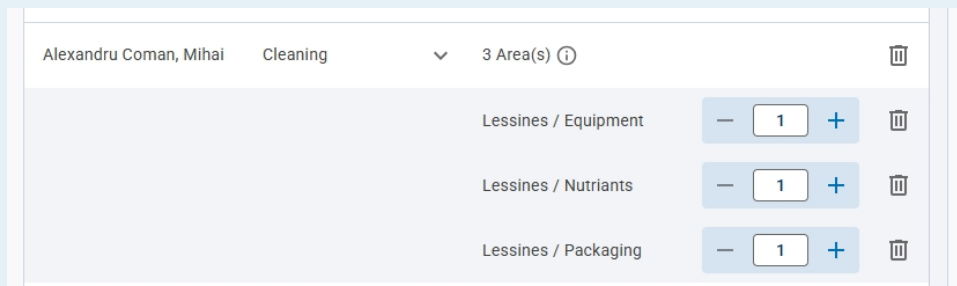
1. Go to the **Employee Management** application > **Skills** tab.
2. Select an **Area** and a **Team**.
3. Adjust, per employee, the **Skill level** with the plus and minus signs.

Changes are saved automatically.

- View all areas where a skill is needed by hovering with your mouse above the ⓘ sign.
- Ungroup similar skills and manage the skill levels separately.

Example

Select the arrow to ungroup similar task and manage the skill levels separately.



- Select the garbage icon behind a skill to delete it.
- Select **+ Add skills** to add one or more skills to an employee. Make sure the correct **Work area** is selected and choose a **Skill** and **Level**. By default the current day is defined as the start date. It's not necessary to define an end date. Select **+ Add skill** to add more.


e^x $\frac{1}{\pi}$ $(k!)^4$ π

Example



Add skills

You're adding a skill to Alexander Rodriguez, Johan.

Work area
Lessines / Equipment

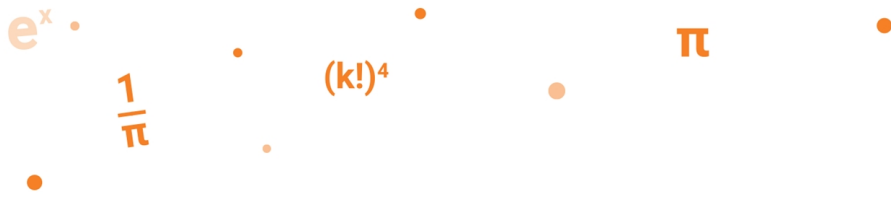
Skill * Level * 

[+ Add skill](#)

Start date *  Today End date (optional) 

[Cancel](#) [Save](#)

- The skill level cannot be adjusted, when the minimum and maximum experience level of a skill - defined in the **Support Manager** application - is the same.



Contact information

For further information contact ORTEC, either through your existing ORTEC representative or by using the appropriate contact details listed on www.ortec.com

Our website offers case studies, white papers, brochures, demos and much more.