

ORTEC Workforce Scheduling 7

User Manual ESS 7

October 2026 - Public

ORTEC

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1 ORTEC Employee Self Service 7

1.1 Introduction

ORTEC Employee Self Service 7 (**ESS 7**) is a mobile app that works in conjunction with **ORTEC Workforce Scheduling 7** and is built as a plugin on the ORTEC Relevance platform. With **ESS 7** you can check your schedule, create leave requests, swap shifts with colleagues, and much more.

This document explains the different features of the release and is designed to help you use it successfully.

> The features described here may not all be available to you, depending on your organization's system configuration and the permissions you've been granted.
>
> The appearance of the app may also vary slightly depending on your operating system and version, compared to the provided screenshots.

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2 Log in

ESS 7 is a responsive application, available on both mobile and web. It's designed to adapt effortlessly to various screen sizes and orientations, providing users with a consistent and user-friendly interface.

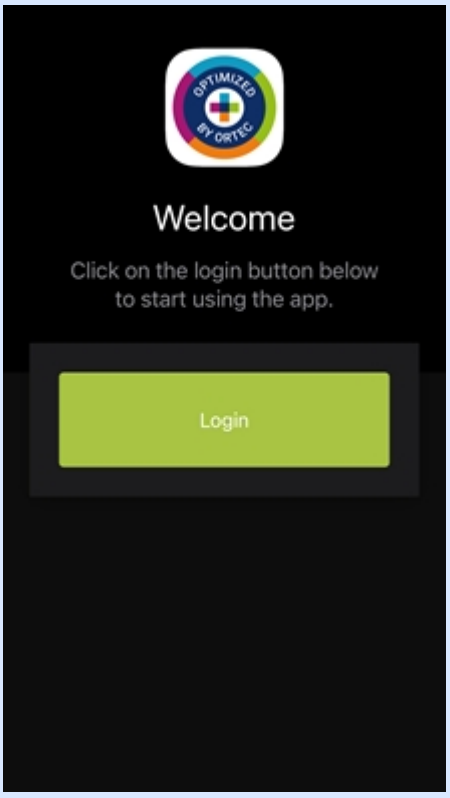
2.1 Log in | Mobile

Download and install:

- From the Google Play Store if you're using an Android device.
- From the Apple App Store if you're using an iOS device.

1. Open **ESS 7**.
2. On the **Welcome** screen, select the **Login** button.

Example



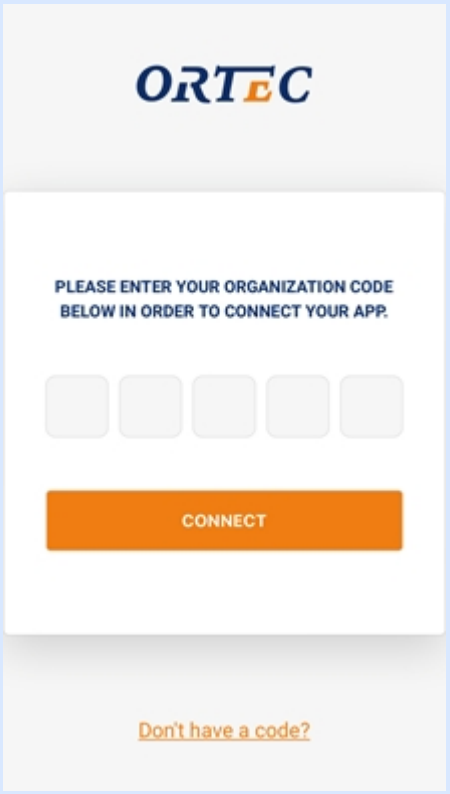
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3. Enter your organization code.

> Your organization code is a unique 5-character code. If you don't have an organization code, contact your organization's ORTEC WS administrator.

4. Select **Connect**.

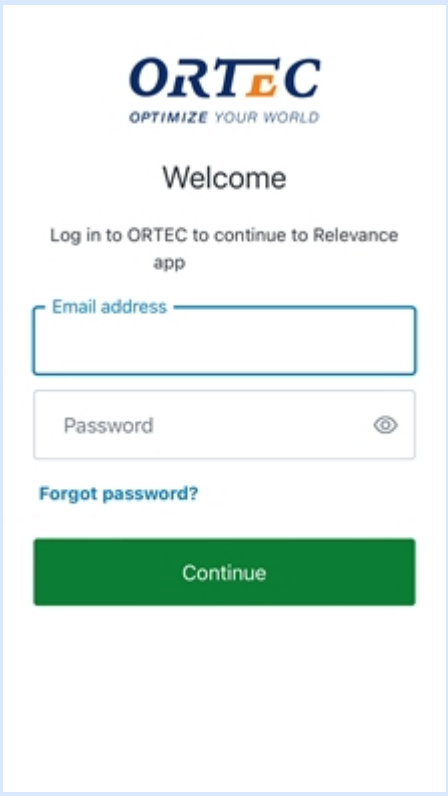
Example



5. Enter your **Email address** and **Password**, and select **Continue**. You're logged in and can start using the app.

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Example



2.2 Log in | Web browser

Supported web browsers

ORTEC intends to support the latest versions of these web browsers. At the time of release of new browser versions, there may be a possibility that an issue arises with our software. ORTEC will try to resolve this in a future release of our software as quickly as possible, depending on the impact.

- Google Chrome
- Mozilla Firefox (v55.0 and later)
- Apple Safari (iOS 16.1 and later)
- Microsoft Edge

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1. Open the **ESS 7** URL supplied to your organization in a supported browser.

   > Contact your manager, if you don't know this URL.

2. Enter your user name and password.
3. Click **Continue**.

   How to bypass a pop-up blocker

   ESS7 runs on the ORTEC Relevance platform. A pop-up is used to pass login credentials from the Relevance platform to ESS7. In the mobile app, this happens automatically: the attentive user briefly sees the pop-up, in which Relevance credentials are automatically used to log in to ESS7. When using ESS7 in a web browser, the same process occurs, however this process fails if a browser's pop-up blocker is enabled.

   If a pop-up blocker is in use, on first use, the pop-up will be blocked. The user will generally be asked if they want to block the pop-up, allow it one time, or allow always for this website. Pick the option to always allow the pop-up for this website. On future use, the pop-up will open and the login process automatically completes successfully.

   Instructions on how to allow pop-ups for a specific website, per supported web browser:

   Google Chrome

   Mozilla Firefox

   Apple Safari

   Microsoft Edge

   > Organizations may have a pop-up blocker installed for the whole organization. In this case it may not be possible for individual users to allow pop-ups.
   >
   > Organizations using a pop-up blocker for the entire organization can centrally whitelist ESS7 URL. This needs to be done for each supported web browser separately. As administrators often authorize access to meet their specific requirements, this is outside this manual's scope.

4. Once signed in, you can access your account in the upper-right corner of the application screen. From there, you can:

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- Download the ESS 7 app
- Change the language of the user interface
- Log out

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3 Your schedule

Use the **Schedule** tab to view your past and upcoming shifts. Your schedule is organized by scheduling period, which is a predetermined time range set by your planner or manager. Scheduling periods can range from a few days to several months.

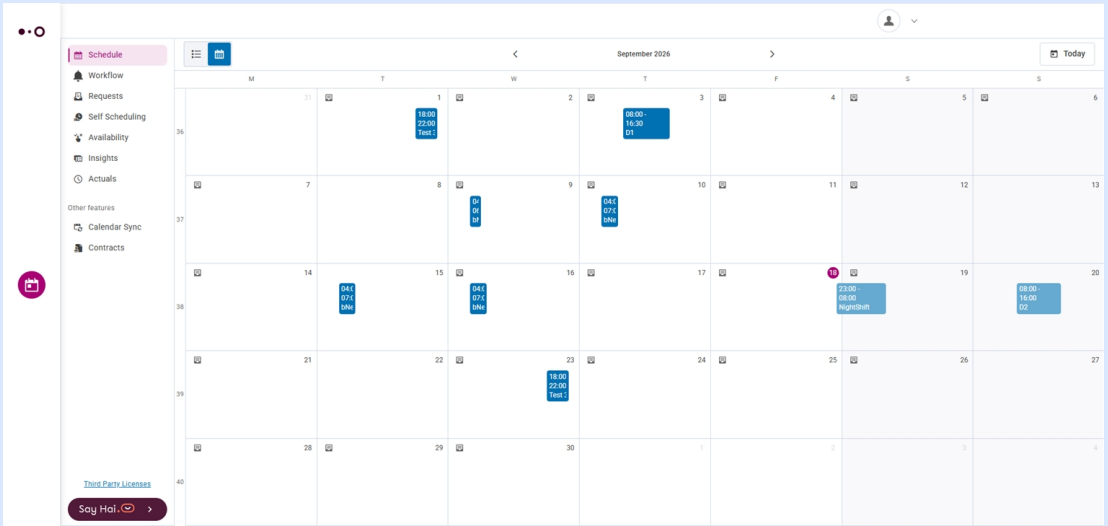
By default, your schedule shows the shifts for the current month.

Web: Each shift includes the following information:

- Date
- Start and end time
  Shifts are scaled according to the start and end time.
- Name
- Department

If the shift duration is very short, name, times, and department are available on hovering the shift.

Example



Mobile: Shift information is never shown directly due to a lack of space. Click on a day with a gray block to view all shift information.

3.1 Icons

Go to the day to view the remark or request.

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Example

Remark on a shift:



Remark on a day:



Request:



3.2 Public holidays

Web: Public holidays are shown in the calendar on the day, including the name of the public holiday.

Mobile: Public holidays are represented by a corresponding icon. The holiday name is shown when viewed on the day.

3.3 Navigate through your schedule

Example

Toggle between list view and calendar view. This toggle is located in the top-left corner of the top bar.



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Go to the previous month:



Go to the next month:



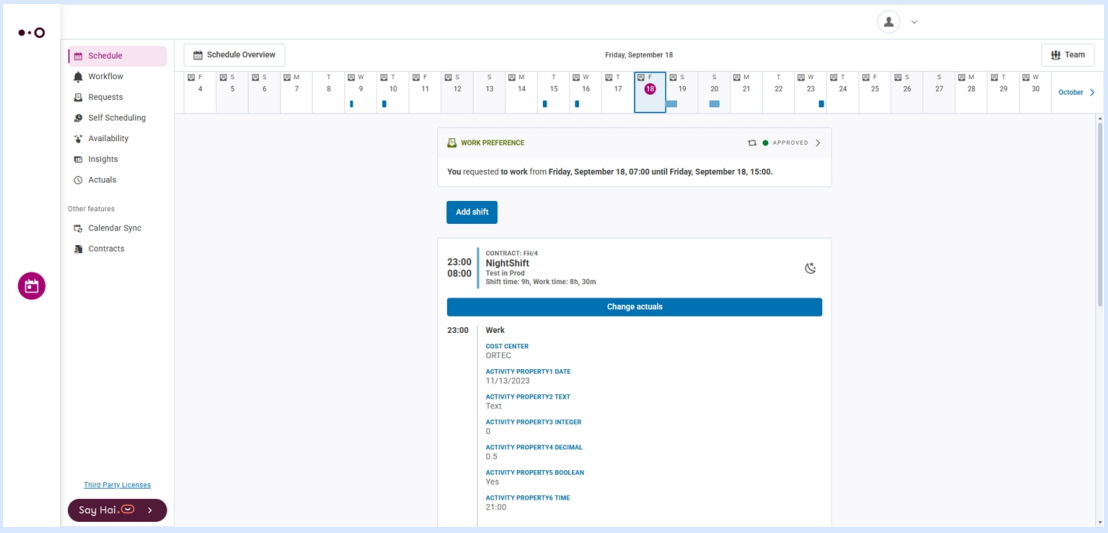
Return to the current day. This button is located in the top-right corner of the top bar.



3.4 Ribbon calendar on day

On the day, a ribbon calendar offers more context about the day, and the days around it. The ribbon calendar contains all icons mentioned above, and is shown on all screen sizes.

Example



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3.5 Schedule changes

After publishing the schedule, your planner can still make some last minute changes. Here are some examples of schedule changes:

- A shift is added or deleted
- A shift is replaced by another shift
- A shift is updated (for example with a different start and/or end time)

3.5.1 View your schedule changes

View changes in your schedule. You can also find an overview of schedule changes in the **Workflow** section under **Schedule Changes**. Each change is listed in chronological order based on the shift's start date and time, with the following details:

- Date: the date for which the change is relevant
- Type:
  - **Required**: your planner added, deleted or replaced the assigned shift
  - **Requested**: you requested another shift assignment
  - **Updated**: the assigned shift was updated
- **Old shift**: the shift that was originally assigned to you
- **New shift**: the shift currently assigned to you
- **Changed on**: the date and time the change was entered, followed by the name of the planner or manager who entered the change

3.5.2 Check your schedule changes

Confirm schedule changes to your planner or manager as follows:

1. In your **Workflow**, browse to **Schedule changes**. Each schedule change is presented on a separate line.
2. Next to a schedule change, select the **Check** button.
   The checked schedule change is removed from the **Schedule changes** overview.

> To check all schedule changes, scroll to the bottom of the list and select **Check all**.

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4 Your team's schedule

Find out which colleagues are working during each shift by checking the **Team Schedule**, organized by shift type. You'll see who is assigned to each shift and the times they'll be working. You can also check the **Team Schedule** to see which colleagues are working on a specific day.

In the team schedule, the user's own shift is marked in blue. When opening the team schedule, your shift is automatically shown.

4.1 View team's schedule

1. On the **Schedule** tab, select a date.
2. In the upper right corner, select the  button. The **Team Schedule** section appears.
3. (Optional) **Select department**: to view the **Team Schedule** for a specific department, select it from the list of departments you're assigned to.

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5 Workflow

Via the **Workflow** tab you can get a quick overview of

- the "Schedule changes" on page 16,
- Periods available for self scheduling (for more information, see "View scheduling information" on page 34),
- Actuals pending approval (for more information, see "Actuals" on page 29),
- Requests pending approval (for more information, see "View requests pending approval" on page 27),
- and "Shifts to accept" on page 17.

Depending on your permissions, some options may not be available to you.

5.1 Schedule changes

After publishing the schedule, your planner can still make some last minute changes. Here are some examples of schedule changes:

- A shift is added or deleted
- A shift is replaced by another shift
- A shift is updated (for example with a different start and/or end time)

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- Date: the date for which the change is relevant
- Type:
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  - **Updated**: the assigned shift was updated
- **Old shift**: the shift that was originally assigned to you
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- **Changed on**: the date and time the change was entered, followed by the name of the planner or manager who entered the change

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2. Next to a schedule change, select the **Check** button.
   The checked schedule change is removed from the **Schedule changes** overview.

> To check all schedule changes, scroll to the bottom of the list and select **Check all**.

5.2 Shifts to accept

The **Shifts to accept** feature may be available to you if you work in a workplace with short-term scheduling, such as daily or half-day planning. This feature gives you the flexibility to review your assigned shifts and choose to either accept or reject them as needed.

How it works:

1. The schedule is in status **Plan**.

> - A shift is planned in ORTEC WS, with duty property ShiftToAccept.
> - If the schedule is in Published status, all shifts will be visible regardless of their properties. This means that even shifts that have not yet been accepted will appear as planned.

2. You get a notification.
3. The shift appears in your **Workflow** tab > **Shifts to accept**.
4. You accept:
   a. In ORTEC WS the property changes to Accepted.
   b. In ESS7 the shift is shown in the schedule.
5. You decline:
   a. In ORTEC WS the property changes to Declined.
   b. The shift is unplanned and the planner re-plans for another employee.
6. After execution of shifts, schedule moves to Published and Justified.

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6 Availability

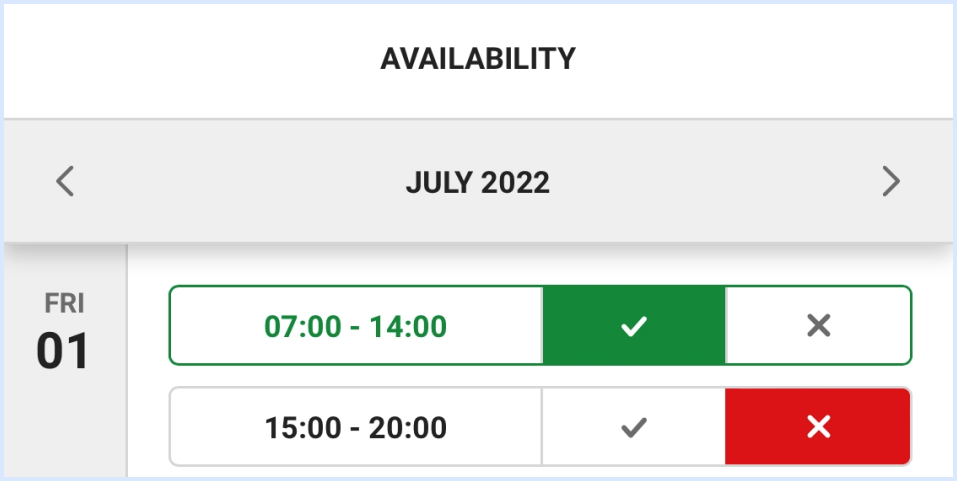
Use **Availability** to indicate your preferred working and off times, and automatically notify your planner or manager. This helps ensure your preferences are considered when assigning shifts.

6.1 View your availability

1. (Mobile users) Select **MORE**.
2. Select **Availability**. For the current month, you get an overview of your availability:
   - During specific times:
     If you indicate a preference to work during a specific time, your availability is presented in green. If you indicate a preference to be off during a specific time, your availability is presented in red.

     Example

     On July 01, 2022 you prefer to work from 7:00 to 14:00 and to be off from 15:00 to 20:00.

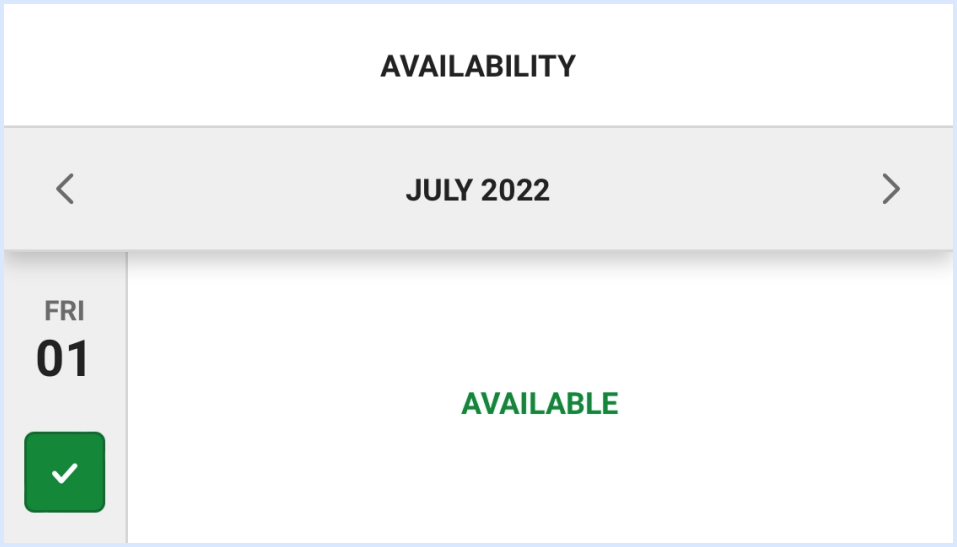
     

   - During entire days:
     If you indicate a preference to work during an entire day, that day is marked as **Available** in your overview. In this case, specific times aren't presented.

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Example

On July 01, 2022 you prefer to work the entire day. Your availability is presented as follows:



Use the < button to go to the previous month, and the > button to go to the next one.

6.2 Enter availability for a day

1. (Mobile users) Select **MORE**.
2. Select **Availability**. For the current month, you get an overview of your availability.
3. Go to the day where you want to enter your new availability.

   Use the < button to go to the previous month, and the > button to go to the next one.

4. Select the **v** button to indicate you're available.
   Your availability is now presented in green.

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6.3 Enter availability

1. (Mobile users) Select **MORE**.
2. Select **Availability**. For the current month, you get an overview of your availability.
3. Go to the day where you want to enter your new availability.

> Use the < button to go to the previous month, and the > button to go to the next one.

4. Select the **v** button to indicate when you're available.
   Your availability is now presented in green.

6.4 Enter unavailability for a day

1. (Mobile users) Select **MORE**.
2. Select **Availability**. For the current month, you get an overview of your availability.
3. Go to the day where you want to enter your new unavailability.

> Use the < button to go to the previous month, and the > button to go to the next one.

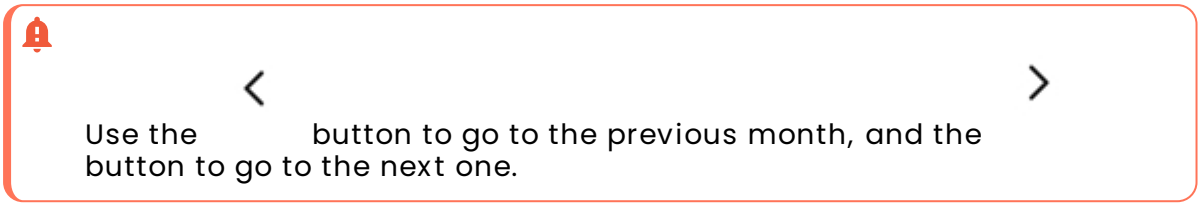
4. Select the **x** button to indicate you're available.
   Your availability is now presented in red.

6.5 Enter unavailability

1. (Mobile users) Select **MORE**.
2. Select **Availability**. For the current month, you get an overview of your availability.

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3. Go to the day where you want to enter your new unavailability.



Use the button to go to the previous month, and the button to go to the next one.

4. Select the **x** button to indicate when you're unavailable.
Your unavailability is now presented in red.

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7 Requests

Use **Requests** to let your planner or manager know your personal preferences. These requests will be considered when creating the schedule. The following types of requests are supported:

- **Work Request**:
  Use this request to indicate your preferred working and off times or shifts.
- **Leave Request**:
  Use this request to ask for time off, such as vacation or special leave.
- **Swap Request**:
  Use this request to swap shifts with a colleague on a certain day.

7.1 Create a new work request

Inform your planner or manager about your preference to work or be off during specified times or shifts.

1. (Web) Select, on the **Requests** tab, the **+ Add request** button.
   (Mobile) Select, on the **More** > **Requests** tab, the **+** button.
2. Select **Work preference**.
3. Select the kind of work request: **I want to work** or **I want to be off**.

   Select **I want to be off** to inform your planner or manager that you prefer not to work during the times or shifts indicated in the request. To request vacation or other paid time off, create a leave request.

4. **Type of request**: select one of the following options:
   - **Time period**: select this option if you want to work or be off during specified times. Continue with step 6.
   - **Shift**: select this option if you want to work or be off during specified shifts.
5. **Date**: select the date for which you want to want to create a request.
6. **Select a shift**: select the specific shift you want to work or be off. Continue with step 7.
7. Specify if the period should cover **All day**. Specify the date(s) (and time(s)) in the **From** and **To** boxes.
8. (Optional) Add text in **Remark**. This remark is shown in the message that your planner or manager receives for approval of your request.
9. Select **Send**. Your newly created work request is sent to your planner or manager for approval.

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7.2 Create a new leave request

With leave requests, you can ask your planner or manager for paid time off, such as vacation or special leave. Create a new leave request as follows:

1. (Web) Select, on the **Requests** tab, the **+ Add request** button.
   (Mobile) Select, on the **More** > **Requests** tab, the **+** button.
2. Select **Leave**.
3. The first option is pre-filled.
4. **Type of leave**: Choose your leave type from the drop-down box.

   > The types of leave that are available to you, depend on your organization's system configuration.

5. **Duration**: Select one of the following options:
   - **Part of a day or (part of) a shift**: Select this option to inform your planner or manager that you only want to replace part of the working day/shift by leave.
   - **One full day**: Select this option to create a leave request for one calendar day (24 hours starting from midnight).
   - **Multiple days**: Select this option to create a leave request for multiple calendar days.

   > The duration for which you can create leave requests, depends on your organization's system configuration.

6. Depending on your selection in step 4, specify the following:
   - **Date**: Select the date for which you want to request leave.
   - **From** and **To**: If you want to request leave for part of a day or (part of) a shift, specify the times in these boxes.
   - **Date range**: If you want to request leave for multiple days, specify the respective dates.
7. (Optional) Add text in **Remark**. This remark is shown in the message that your planner or manager receives for approval of your request.
8. Select **Send**. Your newly created leave request is sent to your planner or manager for approval.

   > You will receive a notification: Your leave request for the period from {{startdate}} to {{enddate}} has been approved/rejected.

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7.3 Swap requests

After your schedule is created and published, there can still be occasions where you're assigned to a shift that doesn't match well with your private life. In **ESS 7**, you can create a request to assign this shift to a colleague in one of the following ways:

Swap a shift

With this option you can request to swap the shift for another one that's already assigned to a colleague. The new shift can be on the same or a different date. For more infomation, see "Create a new request to swap a shift" on page 24.

Give away a shift

With this option you can request (one of) your colleagues to work the shift without getting another one in return. For more information, see "Create a new request to give away a shift" on page 25.

7.3.1 Create a new request to swap a shift

If you want to ask a colleague to swap your shift for one of theirs, you can create a new request as follows:

1. Select **Schedule**.
2. (Optional) Select  to toggle to the calendar view.
3. Navigate to the date on which you want to swap a shift.

   You can only create a swap request for a future shift.

4. Select the shift you want to swap.
5. Select **Request swap**. A new window pops up.
6. **Select which shift you would like to swap**: By default, the shift you selected in step 4 is selected. If you're assigned to multiple shifts on this date, you can alternatively select the one you want to swap.
7. **What do you want to do with your shift?**: By default, **Swap** is already selected.

   For more information on how to give away a shift, see "Create a new request to give away a shift" on page 25.

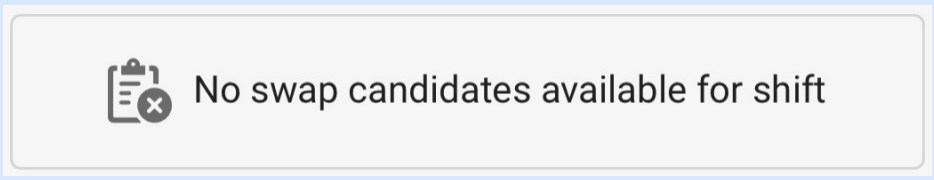
8. **Select a preferred date**: Select the date on which you prefer to work one of your colleague's shifts. This shift can be on the same or a different date than the one you want to swap. For the selected date, you get an overview of the

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following:

- Your shifts for the selected day (if you're scheduled to work on this date).
- A list of colleagues that are available to swap shifts with, ordered per shift type. If no colleagues are available, you get a message as shown in the following example:

Example



The availability of a colleague to swap shifts on a certain day, depends on the required qualifications and applicable labor rules.

9. Select **Swap** next to the colleague that you want to swap with. A new window pops up with an overview of your request.
10. (Optional) Type a message to your colleague in **Remark**.
11. Select **Request swap**. The request is sent to your colleague for approval and its status becomes available in your **Requests**.

Your colleague can approve or reject your request. Depending on your organization's system configuration, further approval from your planner or manager is needed before the request is processed in your schedule.

7.3.2 Create a new request to give away a shift

If you want to ask (one of) your colleagues to work your shift without getting another one in return, you can create a new request as follows:

1. Select **Schedule**.
2. (Optional) Select  to toggle to the calendar view.
3. Navigate to the date on which you want to give away a shift.

You can only create a request to give away a future shift.

4. Select the shift you want to give away.
5. Select **Request swap**. A new window pops up.
6. **Select which shift you would like to swap**: By default, the shift you selected in step 4 is selected. If you're assigned to multiple shifts on this date, you can alternatively select the one you want to give away.

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7. **What do you want to do with your shift?**: Select **Give away**. You get a list of colleagues that are available to give away the selected shift.

   > The availability of a colleague to give away a certain shift, depends on the required qualifications and applicable labor rules.

8. Choose one of the following options:
   - At the top of the list of available colleagues, select **Send to all** to send the request to all available colleagues.
   - Select **Give away** next to the colleague that you want to send the request to.

   A new window pops up with an overview of your request.
9. (Optional) Type a message to your colleague(s) in **Remark**.
10. Select **Request swap**. The request is sent to your colleague(s) for approval and its status becomes available in your **Requests**.

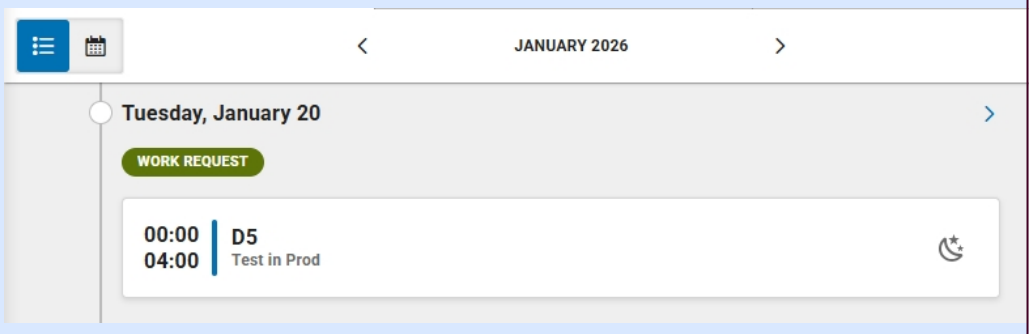
Your colleague can approve or reject your request. Depending on your organization's system configuration, further approval from your planner or manager is needed before the request is processed in your schedule.

7.4 View request information

You can view information about your requests in the following ways:

1. Select **Schedule** and make sure the list view is selected to view a list of your shifts for the current month. If there's a request on a certain date, you can view it underneath that respective date as shown in the following example:

   Example

2. For information about your request, select the date.

Or:

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1. Select **Schedule** to view a list of your shifts for the current month.
2. Select the  button to toggle to a calendar view of your schedule. If there's a request on a certain date, you can view it as follows:

   Example

   : Indicates that there's a request on this day.

3. For information about your request, select the date.

Or:

1. (Mobile users) Select **MORE**.
2. Select **Requests** to view a list of your requests.

7.4.1 Displayed information

Each request shows one of the following statuses:

- **Pending**: The request is created, but your planner or manager hasn't approved or declined it yet.
- **Declined**: The request is declined.
- **Approved**: The request is approved.

Depending on the type of request, the following information is also displayed:

- **Work Request**:
  - Whether you requested to work or not to work
  - Time or specific shift during which you indicated your work preference
  - Date
- **Leave Request**:
  - Type of leave
  - Date
- **Swap Request**:
  - Your current shift that you want to swap
  - Your colleague you want to swap with
  - Your colleague's shift you want to swap your current shift with

7.5 View requests pending approval

For requests you created that haven't been approved or declined yet by your planner or manager, you can get a quick overview as follows:

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1. Select **Workflow**.
2. Select **Requests pending approval**. You get a list view of your submitted requests with status **Pending**.

7.6 Adjust a pending request

If the status of your work or leave request is **Pending**, you can still adjust it as follows:

1. Navigate to the pending request as described in "View request information" on page 26 and "View requests pending approval" on page 27.
2. Select the  button next to the **Pending** status of the request.
3. Select the **Adjust** button.
4. Adjust the details of your request.
5. Select **Send**. Your adjusted request is sent to your planner or manager for approval.

If you want to adjust a request after it was already approved, contact your planner or manager.

7.7 Remove a pending request

If the status of your work or leave request is **Pending**, you can still remove it as follows:

1. Navigate to the pending request as described in "View request information" on page 26 and "View requests pending approval" on page 27.
2. Select the  button next to the **Pending** status of the request.
3. Select the **Remove request** button.
4. To confirm that you want to cancel the request, select **Yes** The request is deleted from your **Requests** and no longer available for processing by your planner or manager.

If you want to remove a request after it was already approved, contact your planner or manager.

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8 Actuals

Enter your actual work hours for shifts in your personal schedule. This is useful for departments like payroll, invoicing, and management that need to use actual hours rather than scheduled ones.

8.1 Enter actual work hours

To update a shift with actual work hours:

1. Go to your **Schedule** and select the shift that you want to update.
2. Select **Enter actuals**. The **Enter actuals** screen appears.
3. (Optional) Enter a **Remark**. This remark will be visible to your planner or manager.
4. Enter your actual work hours and activities:
    - Select **Edit activity** to edit existing information. Depending on your organization's configuration, you can adjust:
        - **Start**: actual start time of an activity
        - **End**: actual end time of an activity
        - **Activity type**: indicates what you did during the specified time interval
        - **Workstation**: location where you worked (such as a building, room, desk, or customer)
        - **Cost center**: used to split hours and cost over different cost centers
        - **Address**: represents the location where the activity took place and is mostly used to calculate travel distances
    - Add additional activities:
        - **Add activity at the start**: to add a new activity at the start of a shift
        - **Add new activity**: to add a new activity in between existing ones
        - **Add activity at the end**: to add a new activity at the end of a shift after the selected activity.
    - Select symbol **Remove** to delete an activity.

      A shift must have at least one activity, so you can't delete the only activity of the shift.

5. Depending on your organization's configuration:
    - the actuals may be immediately processed in your schedule without approval from your manager or planner, or
    - the actuals may need approval from your manager or planner. In this case, they'll be added to **Actuals pending approval** in your **Workflow** with one of the following statuses:
        - **Pending**: the actuals have been sent to your manager or planner for approval

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- **Declined**: the actuals have been declined by your manager or planner
- **Approved**: the actuals have been approved by your manager or planner, and processed in your schedule

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9 Insights

ORTEC WS stores your shift schedule, so it can provide valuable information such as sick leave time, vacation time, overtime, and hours worked. Your planner or manager can set up insights for your organization to display this information in **ESS 7**.

Accounts and reports have different purposes:

- **Accounts**: These are overviews of your various balances such as leave, overtime, contractual hours, and more. They show how much leave, time, or credit you have left in each category. Each account is tied to a specific type of hours or leave and gives you real-time access to your current status.
- **Reports**: These are organized summaries or detailed overviews based on your data, such as your leave requests, work preferences, scheduled shifts, or actual hours worked over a specific period. Reports allow you to see trends, totals, or patterns, and often present several cards or activities together in a clear format.

9.1 Reports

1. (Mobile users) Select **MORE**.
2. Select **Insights** > **Reports**.

> The standard reports are **Accounts**, **Personal schedule**, **Master schedule ESS**, **Overview shift reassignments**, and **Self Scheduling ESS**. Each of these report has its own set of standard parameters.
>
> For the custom reports the parameters vary by organization.

3. Complete one or more parameters, some of which may be interdependent.
4. Select **Generate report** or (mobile users) **Pdf download**.
5. (Web users) To download or print the report, select the respective icons in the top-right corner of the report.

> Via the **Admin configuration** button admins can view and change the reports that are available to users.
>
> - Saved changes in available reports are immediately available to all users.

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10 Shift picking or bidding

Due to circumstances such as last-minute absence or work that wasn't planned at the time of publishing your schedule, additional shifts can become available. Your planner or manager can mark these shifts to be available for shift picking/bidding.

Shift picking/bidding allows you to view the additional shifts, and choose the ones you want to add to your schedule. Depending on the configuration, you can either add shifts directly or only after approval by your manager or planner.

10.1 View shifts available for shift picking or bidding

1. Go to your **Schedule**.
2. Select the month for which you want to view shifts available for shift picking/bidding. If there are shifts available in the selected month, **Looking for more work?** is shown on top of your schedule.
3. Select **Looking for more work?**. The **Shifts available** screen provides a list view of shifts available for shift picking/bidding in the selected month.

You can only view shifts for which:
- There's no overlap with an already scheduled shift.
- They have the required qualifications.

Attention : Not all visible shifts can be selected. When you try to select a shift, additional checks are performed, for example, against employment conditions and rest period rules. If selecting the shift would result in a violation, you cannot select it.

10.2 Pick a shift

1. Go to the **Shift available** screen. For more information, see "View shifts available for shift picking or bidding" on page 32.
2. Select the **Pick** or **Apply** button next to the shift you want to add to your schedule.
3. Select **Confirm**.

Depending on the configuration, the shift is either added to your schedule immediately or only after approval by your manager or planner. To remove a picked shift from your schedule, you need to request a swap with a colleague or contact your manager or planner.

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11 Self scheduling

Work together with your colleagues to create an initial schedule for a given period, taking into account individual preferences. This helps you align your work schedule with your personal schedule and improve your work-life balance. **ESS 7** supports self scheduling through multiple rounds, with the number and time range of the scheduling period determined by your organization's configuration.

This section covers the most common process of three scheduling rounds.

11.1 Round 1

Create and adjust your initial schedule in **Round 1**. Your planner or manager specifies a scheduling period during which you can start scheduling and which shifts are available for picking. At the end of **Round 1**, you'll receive points based on the shifts you've picked. These points are determined by the number of employees needed for the shift and how many of your colleagues also picked that shift.

Example

If you pick shift A, you'll receive points based on the number of employees your planner or manager needs (minimum of five, ideally seven, and no more than 10) and how many of your colleagues also picked that shift.

Employees who added shift A to their schedule	Situation	Points awarded
< 5	Understaffed	10
5 - 6	Semi understaffed	8
7	Matching demand	6
8 - 10	Semi overstaffed	4
> 10	Overstaffed	2

ESS 7 calculates the points you receive for each shift based on the number of employees needed and the number of colleagues who picked that shift. It also calculates your average number of points per shift, which your planner or manager can use to prioritize individual preferences when finalizing the schedule.

11.2 Round 2

In **Round 2**, you can improve your schedule by removing shifts that have too many people (overstaffed) and adding shifts that don't have enough people (understaffed). The goal is to increase the average number of points you earn per

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shift and reduce the likelihood that your planner or manager will need to change your schedule in **Round 3**.

11.3 Round 3

In **Round 3**, your planner or manager makes final adjustments to the schedule to ensure all work is covered. If changes are needed, they'll consider the average number of points per shift that you and your colleagues earned in **Round 2**. If you earned more points than your colleagues, it's less likely that your schedule will change. You won't be able to see or change your schedule during this round. When your planner or manager is done, you can view the final schedule in your **SCHEDULE**.

11.4 View scheduling information

To view relevant information for a period that's available to you for self scheduling:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for scheduling, select **Periods available for self-scheduling**.
3. Select a period from the list. View the following information:
   - **Round and scheduling period**: period for which you're creating a schedule.
   - **Hours**: select the button to open a drop-down menu:
     - **Before this period**: cumulative amount of hours you over- or underachieved before the selected period.
     - **After this period**: cumulative amount of hours you over- or underachieved after the selected period.
     - **Selected period**: cumulative amount of hours you already scheduled in the selected period, relative to the total amount of hours you need to schedule.
     - **Year balance**: cumulative amount of hours you over- or underachieved in the current year.

     Hours are updated automatically while you create your schedule.

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- **Points**: your points (in green) and the number of co-workers with less points (in gray).

  > Your planner or manager can prioritize individual preferences of co-workers with more points when finalizing the schedule in Round 3.

- **Overstaffed**: number of shift that are overstaffed (in orange).
- **Wildcards**: your wildcards for the selected period. Your planner or manager determines the number of wildcards employees can use.

  > Example
  > Here are some examples on how to use your wildcards:
  > - If you pick an early shift because you have a dinner reservation in the evening, you can apply a wildcard on this shift to indicate your wish.
  > - If you want to be off on a certain day, you can apply a wildcard on this day to inform your planner or manager that you don't want to work that day.

4. **Web**: View the available shifts and duty groups in the schedule, including demands.
   Mobile: Available shifts and duty groups are indicated in gray. View them by clicking on the day.

   - Shift colors indicate the shift type and what actions are available. For example, orange indicates the shift is under- or overstaffed. If you applied for a shift and it turns out to be (semi-)overstaffed, it's advised to deselect this shift and find an alternative.
   - **Web**: On each day, there is space for five lines. If possible, multiple shifts or duty groups are put on one line. If there are more shifts and duty groups available than fit in the schedule, a tag indicates that more shifts are available on the day.

   You can always view the following information per shift:

   - **Start and end time**
   - **Name of the shift**
   - **Shift demand**
   - **Skills**

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11.5 Add note to a day

During **Round 1** and **Round 2**, you can add one note per day to your schedule as long as that round's period is available for self scheduling:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for scheduling, select **Periods available for self-scheduling**.
3. Select an available **Round 1** or **Round 2** period.
4. Select a date on the calendar.
5. To add a short note to this day, select **Add note**.

> **Add note** is only available with general setting **StandardWish** enabled in **ORTEC WS**.

- In the **Add note** panel, fill out a note of max 200 characters.
- Select **Add note**.
  In **ORTEC WS**, a 'request with description' is created for this day. When the user edits or deletes the note, the request is updated accordingly. You can only add one note per day.

11.6 Add shifts to your schedule

During **Round 1** and **Round 2**, you can add shifts to your schedule as long as that round's period is available for self scheduling:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for scheduling, select **Periods available for self-scheduling**.
3. Select an available **Round 1** or **Round 2** period.
4. View the available shifts for a day.

> A gray bar indicates that a shift is available to add to your schedule.

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5. (Optional) To add a short remark to this day, select **Add note**. For more information, see "Add note to a day" on page 36.
6. To add a shift to your schedule, select it.

> All available shift options are displayed in the calendar, even after you've selected a shift. This allows you to see which shifts are unavailable and better understand your alternatives during shift scheduling.
>
> - A blue bar indicates that a shift has been added to your schedule.
> - Shifts that are unavailable based on your current selection will appear grayed out.
> - Shifts are listed in order of start time, and then alphabetically by name.

In **Round 2** you can only add (semi) understaffed shifts to your schedule.

11.7 Add alternative shifts to your schedule

In **Round 2**, you can remove overstaffed shifts from your schedule and replace them with alternative shifts:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for scheduling, select **Periods available for self-scheduling**.
3. Select a **Round 2** period from the list.
4. View the alternative shifts that are available for a day.

> A green dotted line indicates that an alternative shift is available to add to your schedule.

5. Select an alternative shift to swap it with the shift that's currently assigned in your schedule.

> A green bar indicates that an alternative shift is added to your schedule.

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11.8 Remove shifts from your schedule

During **Round 1** and **Round 2**, you can remove shifts from your schedule as long as that round's period is available for self scheduling:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for self scheduling, select **Periods available for self-scheduling**.
3. Select a **Round 1** or **Round 2** period from the list.
4. Select the shift you want to remove from your schedule.

> - A blue color indicates a previously added shift that you can remove from your schedule. An orange color indicates a (semi-)overstaffed shift that you can deselect. An orange color can also indicate a (semi-)understaffed shift. However, we would not advise to deselect that shift.
> - A gray bar indicates that the shift is available to add to your schedule.

In **Round 2** you can only remove (semi) overstaffed shifts. Shifts with a matching demand and (semi) understaffed shifts are locked in your schedule.

11.9 Wildcards

During self-scheduling, employees can use wildcards to indicate preferred shifts or days off. Wildcards help planners and managers take these preferences into account when creating or adjusting schedules.

The articles in this section explain how to apply, remove, and manage wildcards and wildcard remarks.

11.9.1 Apply a wildcard on a shift

After adding a shift to your schedule, you can apply a wildcard to let your planner or manager know that the shift assignment should not be changed:

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1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for scheduling, select **Periods available for self-scheduling**.
3. Select a period from the list.
4. On the calendar, select the shift on which you want to apply a wildcard.

> A blue bar indicates a previously added shift on which you can apply a wildcard.

5. Select the  button to the right of the shift, or select **Set wildcard**.
6. (Optional) On the **Set a wildcard?** panel, add a remark of max 200 characters.
7. Select **Set wildcard**. A wildcard is applied to the shift.
   In **ORTEC WS**, the remark is a text field on the wildcard. In the Master schedule, the remark is shown with the wildcard. When the user edits or deletes the remark, the text field is updated accordingly.

> A purple shift indicates that a wildcard is applied.

> Your planner or manager determines the number of wildcards employees can use.

11.9.2 Remove a wildcard from a shift

After you apply a wildcard on a shift, you can remove the wildcard (or only the remark on the wildcard) from that shift:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for scheduling, select **Periods available for self-scheduling**.
3. Select a period from the list.
4. On the calendar, select the shift on which you want to remove a (remark on a) wildcard.

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A purple shift indicates that a wildcard is applied.

5. Select the  button to the right of the shift or select the **Edit wildcard** button.
6. To remove the wildcard, select **Remove wildcard**. The wildcard is removed from the shift.
   Or
   To remove the remark on the wildcard, first remove the remark from the text field, then select **Save**.

11.9.3 Apply a wildcard on a day

If you want to be off on a certain day, you can apply a wildcard on this day to make sure that your planner or manager can't assign a shift to you on that day:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**
2. To view a list of periods that are available for self scheduling, select **Periods available for self-scheduling**.
3. Select a period from the list.
4. On the calendar, select a date on which you want to apply a wildcard.
5. Select the **Add wildcard** button.
6. (Optional) On the **Do you want to be off?** panel, add a remark of max 200 characters.
7. Select **Set wildcard**. A wildcard is applied on the entire day.
   In **ORTEC WS**, the remark is a text field on the wildcard. In the Master schedule, the remark is shown with the wildcard. When the user edits or deletes the remark, the text field is updated accordingly.

A purple day indicates that a wildcard is applied.

Your planner or manager determines the number of wildcards employees can use.

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11.9.4 Remove a wildcard from a day

After you apply a wildcard on a day, you can remove the wildcard (or only the remark on the wildcard) from that day:

1. (Mobile users) Select **MORE**.
2. Select **Self Scheduling**. Continue with step 3.

Or:

1. Go to **Workflow**.
2. To view a list of periods that are available for scheduling, select **Periods available for self-scheduling**.
3. Select a period from the list.
4. On the calendar, select a date on which you want to remove a (remark from the) wildcard.

   A purple day indicates that a wildcard is applied.

5. Select the **Edit wildcard** button.
6. To remove the wildcard, select **Remove wildcard**. The wildcard is removed from the day.
   Or
   To remove the remark on the wildcard, first remove the remark from the text field, then select **Save**.

11.9.5 Add remark to a wildcard

Add, edit or remove a remark to a wildcard. Remarks can be added while applying a wildcard.

For more information, see "Apply a wildcard on a day" on page 40 or "Apply a wildcard on a shift" on page 38.

Remarks can also be added after a wildcard has been added. Simply select a day or shift with a wildcard (purple bar or line) and select **Edit wildcard**. Add a remark of max 200 characters and select **Save**.

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12 Calendar sync

To support users in planning work and private appointments, shifts can be synchronized to calendars of other applications. The calendar synchronization service sends all planned and tentatively planned shifts of the current month and a year into the future to the private calendar.

Supported calendar applications are Google, Outlook and Apple.

The following data is shared:

- Shift name
- Date
- End time
- Start time

This functionality supports users in planning work-life balance. In the first days of the current month, shifts in the previous month disappear from the calendar, as the past is not needed for planning purposes. Past shifts remain accessible in the ESS7-app.

The application the calendar is shared with collects this data at intervals. Depending on the interval the calendar application uses it may take 6 to 24 hours before the other application has processed changes.

12.1 Synchronize your schedule

In order to synchronize your schedule, you need your schedule's unique web address (URL):

1. (Mobile users) Go to **MORE**.
2. Select **Calendar Sync**.
3. Select **Copy link** to copy your schedule's unique URL to the clipboard.

For more information on how to use the obtained URL to synchronize your schedule, check the respective documentation of your calendar tool:

- Google Calendar
- Outlook
- Apple Calendar

The unique URL provides read-only access to your schedule data. This means you can view the data in another application, but not change it.

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12.2 Regenerate your schedule's address

If you feel that your schedule's unique URL has been compromised, generate a new one as follows:

1. (Mobile users) Go to **MORE**.
2. Select **Calendar Sync**.
3. (Mobile users) In the top right corner, select the  button.
4. Select **Regenerate link**.

After you regenerate your schedule's address, the previously generated URL becomes invalid. Synchronize your schedule with the new URL.

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13 Contracts

View all of your shift assignments across all contracts in one schedule. The active contract you log in with determines which shifts will be displayed as coming from your department, with color code blue. Shifts from other contracts are color coded with light-blue.

The following functionalities are limited to the active contract you're logged in with:

- Requests
- Shift picking
- Self scheduling

If you want to perform actions on shifts from another contract, you can easily switch the active contract. For more information, see "Switch active contract" on page 44.

13.1 Switch active contract

The following functionalities in **ESS 7** are limited to your active contract:

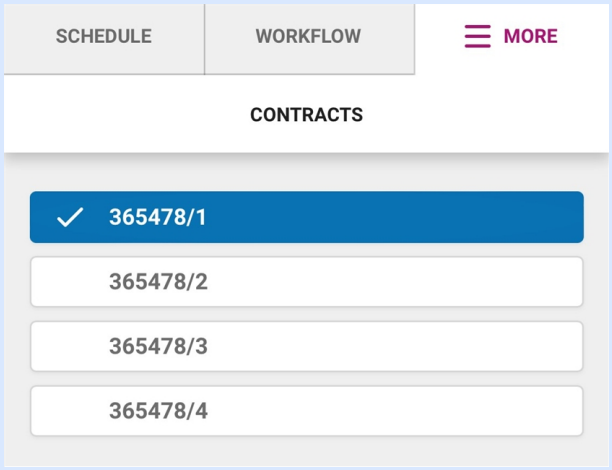
- Requests
- Shift picking
- Self scheduling

If you want to perform actions on shifts from other contracts, you can easily switch your active contract as follows:

1. (Mobile users) Select **MORE**.
2. Select **Contracts**. You get a list view of all your contracts.
3. Select the contract you want to set as active. The contract is now selected as shown in the following example:

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Example



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14 Say Hai

Say Hai is an AI assistant that transforms how you interact with ESS. From checking shifts to submitting work preferences, everything happens through natural, intuitive chat. The goal is speed and ease. It provides an experience that feels more personal and humane than the usual buttons and screens, and it is available to respond in the language you choose.

> The AI assistant is only available if your organization has enabled it. If not, ask your contact person for more information.

14.1 Fair Use Policy

To ensure a reliable experience for all users, Say Hai is subject to a Fair Use Policy. Usage is limited to 1,000,000 tokens per month and 50,000 tokens per minute per customer environment. If these limits are exceeded, ORTEC may take appropriate measures to maintain service performance and availability.

14.2 Supported features

Say Hai helps you manage your work schedule, leave requests, work preferences, leave balances, realizations, and public holiday information.

> The features available to you depend on your permissions and your organization's configuration. For example, your organization may not allow you to create work preferences.

14.2.1 View your shifts

You can view your personal work schedule for the coming days, weeks, or months. Depending on the available information, you can see:

- Your planned shifts, including start and end times.
- The locations or departments where you are scheduled.
- Changes to your schedule, such as shift swaps or adjustments.
- Previous schedules, if historical schedules are available.

> Example
>
> - When is my next shift?
> - Show me my shifts for next week.

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- Am I working this weekend?

14.2.2 View your work preferences

You can view work preferences that you submitted earlier, including:

- Your preferred working hours or days.
- Your preferences for specific shifts or departments.
- Comments that you added to your preferences.

Example

- Show me my work preferences.
- What preferences did I submit for next week?
- Did I say I was available on Friday?

14.2.3 Create work preferences

You can submit new work preferences for upcoming planning periods. For example, you can:

- Share when you prefer to work.
- Indicate when you are unavailable, for example because of a private appointment.

Example

- I prefer to work next Monday morning.
- I'm unavailable on August 24.
- I can work on Friday, but I'd prefer an evening shift.

14.2.4 Delete work preferences

If your preferences change, you can delete preferences that you submitted earlier.

Example

- Delete my work preference for next Monday.
- Remove my preference for August 24.
- I'm available next Friday after all. Remove my preference.

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14.2.5 View public holidays

You can view relevant national and, if applicable, organization-specific public holidays. This can help you:

- Check whether you are scheduled to work on a public holiday.
- Plan leave around public holidays.
- Coordinate your work and personal planning.

Example

- When is the next public holiday?
- Show me the public holidays in December.
- Is next Monday a public holiday?

14.2.6 View leave requests

You can view your current and previous leave requests. For example, you can:

- Check whether the status of a request is pending, approved, or rejected.
- Check for errors or differences in a request and take action if needed.

Example

- Show me my leave requests.
- What is the status of my leave request for August 20?
- Has my vacation request for next week been approved?

14.2.7 Create leave requests

You can submit new leave requests directly through **Say Hai**. You can:

- Specify the period for which you want to take leave.
- Select the type of leave, such as vacation, special leave, or unpaid leave.
- Add a note or explanation for your manager.

Example

- I want to take next Friday off.
- Request vacation from August 24 to August 28.
- I'd like to take two hours of leave tomorrow afternoon.

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14.2.8 Delete leave requests

You can withdraw a leave request if you no longer need it or submitted it incorrectly.

Example

- Cancel my leave request for next Friday.
- Delete my vacation request for August 24.
- I don't need next Monday off anymore. Can you withdraw my leave request?

14.2.9 View your leave balances

You can ask **Say Hai** how much leave you have available. If you have multiple leave balances, you can request an overview of all of them.

Example

- How much leave do I have left?
- Show me all my current leave balances.
- How many vacation hours can I still take?

14.2.10 Request other insights

You can also request other available insights through **Say Hai**.

Example

- What insights can I view?
- Can you show me the insight [insight name]?

14.2.11 Create realizations

You can create realizations for work you have already performed. Depending on your permissions, you can:

- Add a new realized shift.
- Adjust a previously worked shift.
- Add activities that you performed during or after your shift.

Example

- Add a shift I worked yesterday.
- Change yesterday's end time to 17:00.

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- I worked until 18:00 instead of 17:00 last Monday.

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14.3 Disclaimer

14.3.1 1. Use of Generative AI

This application uses generative AI technology solely as a business support tool. The generated output may be inaccurate, incomplete, or unsuitable for your specific use case.

14.3.2 2. EU Regulations & AI Act Compliance

We comply with the relevant requirements of the *Artificial Intelligence Act* (EU 2024/1689), effective as of August 1, 2024, including:

- Transparency and labeling of AI-generated content (including machine-readable tagging).
- Clear information on limitations, risks, and applicable categories of the system.
- Governance, documentation, risk management, and certification where required for foundation and high-risk AI models.
- Adherence to prohibitions on practices such as manipulation, social scoring, and biometric identification.

14.3.3 3. Responsibility of the Business User

You, as the professional end-user, are fully responsible for verifying AI-generated output for accuracy, legal compliance (including AI Act and GDPR), and suitability for your business purposes. Decisions based on AI output are entirely at your own risk.

14.3.4 4. Limitation of Liability

We disclaim all liability for direct or indirect damages arising from the use of AI-generated content. By using this application, you acknowledge that we provide an AI tool, not professional advice.

14.3.5 5. Privacy & Data Protection

Data entered into the application may be processed by AI models. We implement appropriate technical and organizational measures in accordance with GDPR. You are responsible for ensuring that no sensitive or confidential personal data is shared without a valid legal basis.

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14.3.6 6. Governance & Audit

We maintain robust internal processes, audit declarations, and monitoring frameworks in line with EU AI Act guidelines to ensure ongoing compliance, traceability, and updates.

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15 Log out

You can logout from **ESS 7** as follows:

1. In the top left corner of your screen, select the **Account** button.
2. Select **Log out**. You're logged out from the app and redirected to the **Welcome** screen.

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Contact information

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

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