# GEP Service Scheduling Workflow – As-Is & Enhancement Plan

## Current Workflow Summary

### 1. Contract Initiation GEP signs a contract with the client for Safety Engineer and/or Occupational Doctor and other Services.

Contract durations:

* Typically 1 year.
* Shorter for hotels and construction projects (can be days or weeks or months)

### 2. Regulatory Hour Calculation – We Calculate the Assigned Hours for the Client based n the following criteria. Calculation based on SEPE (Greek labor inspection authority) regulations.

### Criteria:

* + Number of installations.
  + Total number of employees per Client / Number of employees per installation
  + Type of installation.
  + Type of work.
* Output: Total required assigned hours per installation for the specific period of service.

### 3. Partner Assignment - Partners (safety engineers/doctors) are assigned to installations.

* Assignment based on:
  + Geographic proximity.
  + Available hours.
  + Cost efficiency.
* Partner must accept the assignment.

### 4. Schedule Planning - Partner drafts a complete schedule covering the agreed period.

* Constraints:
  + Exact match with assigned hours.
  + Visits usually 1-2 hours, spaced monthly or bimonthly.
  + Visits must not overlap (even by one minute).
  + Any other specific client request – just to inform the partner
  + Client-specific conditions (working hours, weekends) must be observed.

### 5. Approval & Locking

* Partner submits schedule for GEP review.
* GEP locks and uploads the final version to SEPE.net.
* Once locked, no edits allowed unless formally requested and approved.

### 6. Modifications

* Partner submits a change request.
* GEP reviews, approves, and:
  + Updates SEPE.net.
  + Informs the client of the change.
* All actions must be traceable.

### 7. Renewals

* On contract renewal:
  + Compare current vs. previous employee/installation data.
  + Recalculate hours.
  + Default: assign the same partner if criteria still match.

## 🔀 Workflow Diagram

1. Form received from the client regarding installations and employees.
2. Hours Calculated (SEPE-based)
3. Finding availability (pre partner assignment) – cost analysis
4. Proposal and Contract Signed
5. Importing Client & Installation Data
6. Partner Assigned (Location, Cost, Availability)
7. Partner Accepts
8. AI-Suggested Schedule Drafted for the whole year (or service date range)
9. Final Schedule Confirmed by Partner
10. GEP Approves & Locks Schedule
11. Schedule Uploaded to SEPE.net & Client Informed
12. Change Request Tracked if Needed

## Specification Requirements

### Functional Capabilities

1. **Calendar interface** for partner portal
2. **Recurring scheduling**
3. **Automatic warning / deny of overlap –** the ability to be able to customize overlap setting per services would be very helpful
4. **AI-Based Schedule Suggestion**
   * Recommend visit plans per installation/partner using:
     + Partner location
     + Travel efficiency
     + Hour availability
     + Cost optimization
     + Client access rules
5. **Cost Management Module**
   * Budget and compare partner costs across installations.
   * Forecast costs.
6. **Change Tracking & Auditing**
   * Full audit trail of:
     + Schedule submissions
     + Modifications
     + GEP approvals
     + Client communications
7. **Email Notification System**
   * Alerts for:
     + Assignment
     + Approval
     + Schedule Lock
     + Change Confirmations
8. **Partner Availability Dashboard**
   * Track historical assignments and open capacity.
   * Filter by cost, location, availability etc.
9. **Renewal Assistant**
   * Recalculate hours upon contract renewal.
   * Compare current vs. previous conditions.
   * Reassign partner if feasible.
10. **SEPE.net Export Interface**
    * Export schedule in excel

Limitations:

* 1. for each installation (project) one partner is assigned for the full duration (at very rare instances more than one). Changes can occur – assigning a new partner. Etc.
  2. Partner Programs are scheduled in advance for the whole duration of the project. Duration of each visit might differ depending on partner availability or customer needs (usually 1 – 2 hours per visit)
  3. Projects are renewed and usually the same partner is assigned
  4. Partners can request a change in visit but must be approved by the client account manager and the client must be informed of the change.