

ORTEC Workforce Scheduling 7

Implementation Manual Team Scheduler

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ORTEC

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Table of Contents

1 Introduction 1

2 Permissions 2

2.1 Other permissions 2

3 Configurable columns employee calculations 4

4 Configurable column employee proposal 8

5 Configurable counts 10

6 Special leave treatments 11

7 Sick leave properties 12

8 Number of schedules on dashboard 13

9 Reports 15

1 Introduction

ORTEC WS for Team Schedulers is a web-based application that helps team schedulers create and modify schedules up until they are formally closed for approval by a manager. It connects securely to **ORTEC Workforce Scheduling**, also referred to as the back-end system, to perform its functions.

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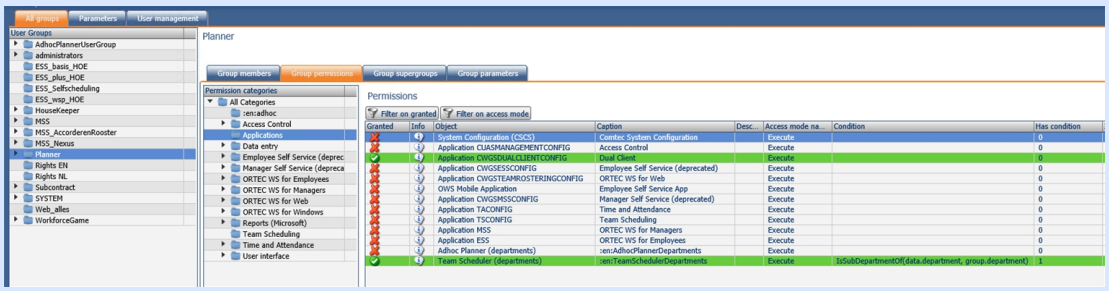
2 Permissions

Manage permissions via **Access Control**.

Before users can use **Team Scheduler App**, the permission: **Team Scheduler (departments)** must be granted to the **User Group** to which they belong. When this permission is granted, the users belonging to this **User Group** can use the application for all the departments specified under **Group parameters** of the group Administrators.

Example

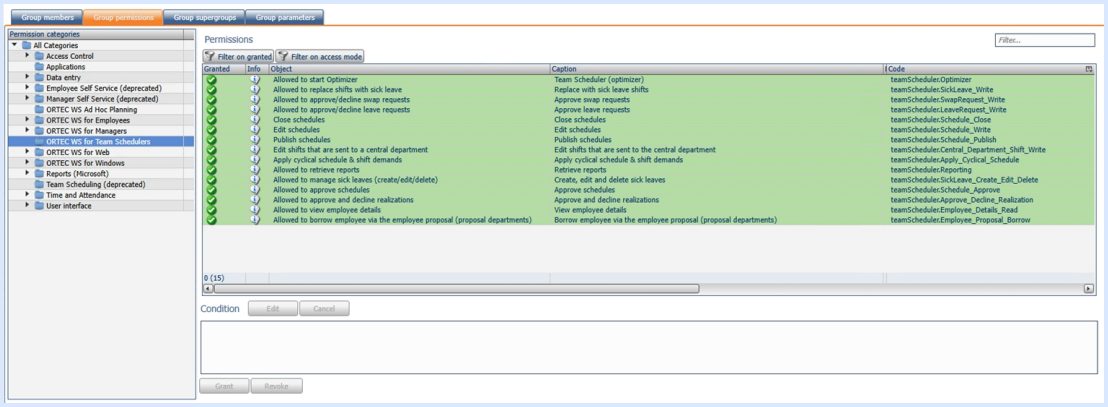
In this screenshot, the user group Planner has been granted the permission Team Scheduler (departments).



2.1 Other permissions

Go to the **ORTEC WS for Team Schedulers** permission category.

Example



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- Apply cyclical schedule & shift demands - Roll out a base schedule with a recurring pattern and/or apply shift demands as vacant shifts; To be used together with the Edit schedules permission.
- Edit shifts that are sent to a central department - Edit the contents of the shift, even when it's currently in a central department.
- Allowed to approve/decline leave requests - Approve or decline leave requests in the Leave requests dashboard tile.
- Allowed to start Optimizer - Start the Optimizer; To be used together with the Edit schedules permission.
- Close schedules - Set the status of a schedule to Closed.
- Publish schedules - Set the status of a schedule to Published.
- Edit schedules - Perform any mutations in the schedule view.
- Allowed to replace shifts with sick leave - Replace shifts with sick leave in the sick leave dashboard tile.
- Allowed to approve/decline swap requests - Approve or decline swap requests in the swap requests dashboard tile.
- Allowed to retrieve reports - With this permission the **Reports** tab is visible. Existing permissions on individual reports are used to determine what user can see which report.
- Allowed to manage sick leave (create/edit/delete) - Create, edit or delete sick leaves in the Sick leave dashboard tile.
- Allowed to approve schedules - Set the status of a schedule to Approved.
- Allowed to approve and decline realizations - Approve or decline realizations.
- Allowed to view employee details - View employee details in the schedule view.
- Allowed to borrow employee via the employee proposal (proposal departments) - Use proposal departments in the employee proposal. Please note that the number of resources retrieved from proposal departments is limited by the ORTEC WS setting MAXNUMBEROFRESULTSINPROPOSAL.

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3 Configurable columns employee calculations

The employee calculations columns that are displayed in the **Employees** panel of the application are configurable.

Example

The Contract hours column is fixed, while the columns to its right are configurable.

Employees ↑	Contr. hours	+/-P	+/-Y	Leave	Self-S Points
Alphen, Roy	40.0	-31:16	-332.37	295	9.29
Baltes, Michelinas	33.6	31:37	27.57	255	9.60
Beerepoot, Gemaa	10.0	-17:11	-85.52	80	10.00
Beijersbergen, Jacob	40.0	-08:46	-187.57	305	9.00
Benz, Casper	20.0	-79:22	-15.03	153	0.00
Bousquet, K.	36.0	-15:24	-165.60	281	8.59

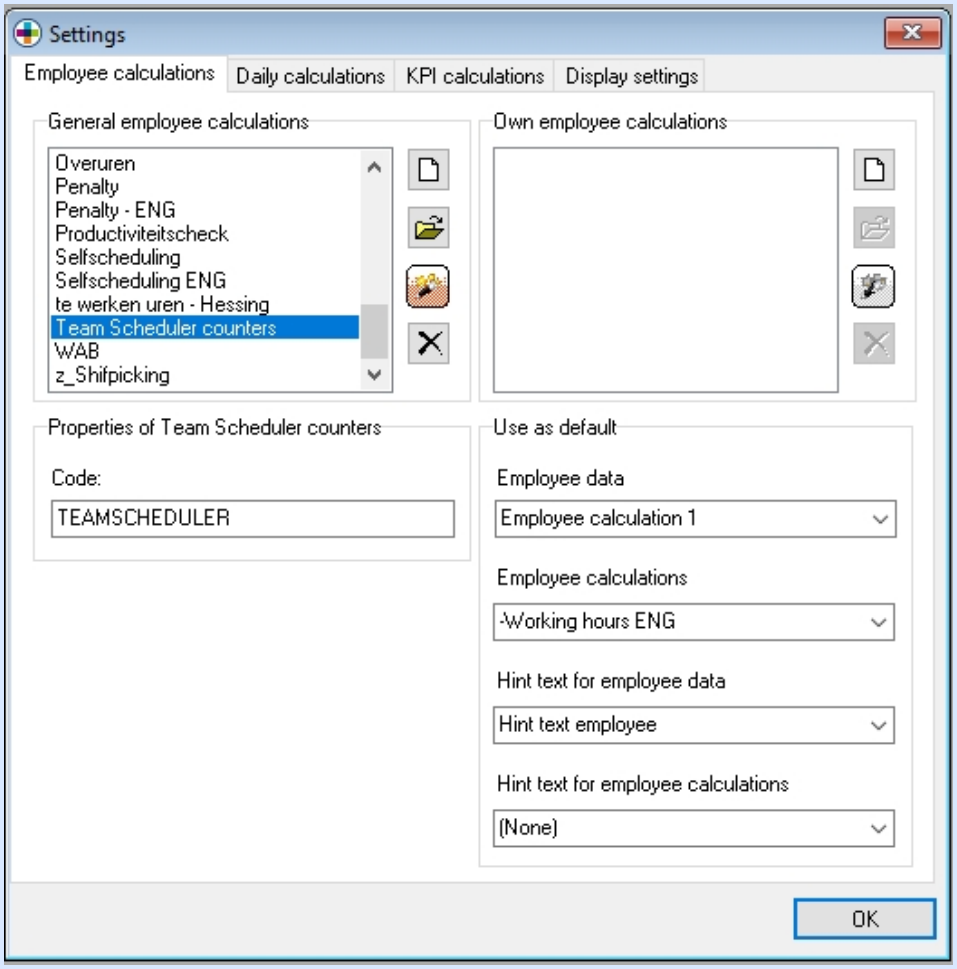
You can define up to eight columns to be displayed.

1. In the **ORTEC WS Client**, go to **General** > **Plan board settings**.
2. In the **Employee calculations** tab, check if there's an Employee calculation with code TEAMSCHEDULER.

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a. If such an entry exists, go to step 3 and continue with the procedure.

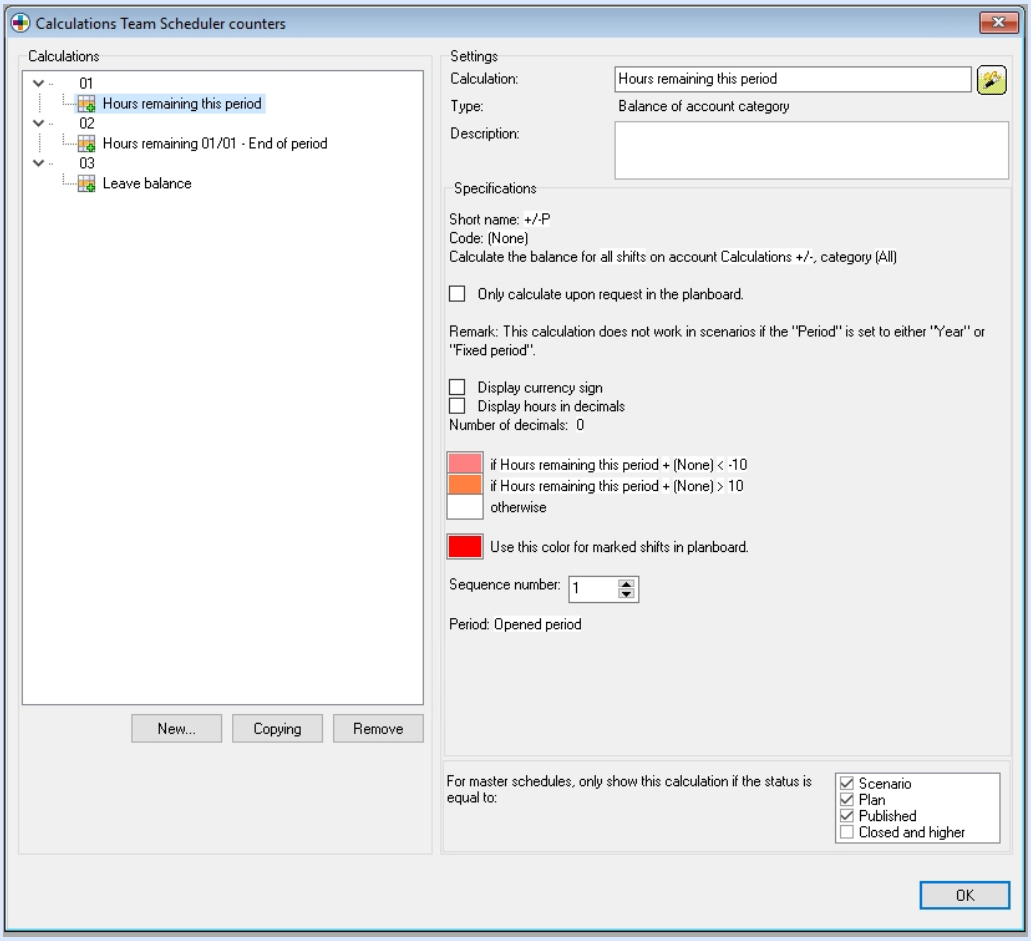
Example



3. Select the Employee calculation and click open .

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Example



4. Add or update the calculation columns that you want to display in the **Team Scheduler App**.

    a. Enter a **Short name** for the calculation. This will be used as the column header in the application.

    > If you add more than eight calculations in the set, only the first eight will be displayed in the app.

    b. Optionally, select **Display hours in decimals** and enter the number of decimal places if you want to see the hours shown as decimal values.

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- It might take up to 24 hours before the updated calculations are displayed in the app (short name and decimal changes usually become effective within 15 minutes).
- Don't create more than one Employee calculation with the code TEAMSCHEDULER. This will lead to conflicts and unpredictable behavior of the application.
- The updates will be applicable to all the departments.

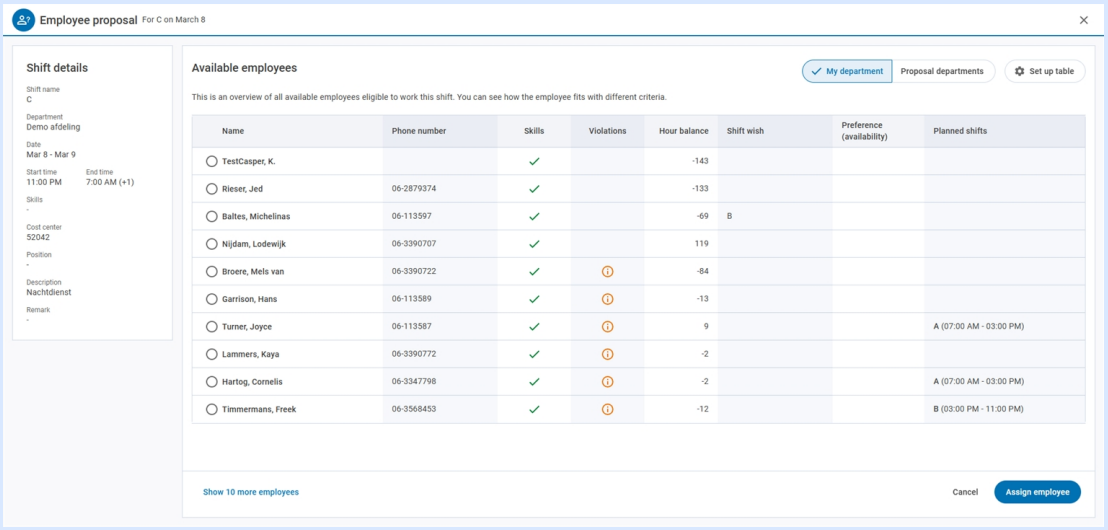
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4 Configurable column employee proposal

When requesting an for a single vacant shift, an overview of available employees is shown.

Example

The 'Urensaldo' column is configurable and shows the account balance.



The following configuration options are available in **ORTEC System Configuration**:

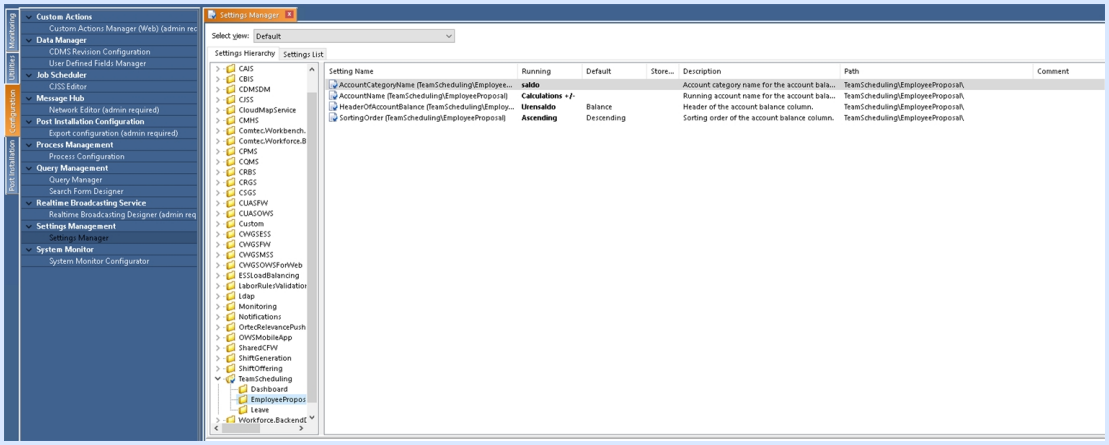
- The displayed header name of this column
- The sorting order (ascending or descending)
- The account & category used to retrieve the balance. The balance will always be calculated for the entire scheduling period of the vacant shift.

Note 1: After configuring the displayed header name and/or sorting order, restart the API, via cmd > Run as administrator, iisreset.

Note 2: After configuring the account & category used to retrieve the balance, restart the server process that handles Team Scheduler traffic.

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Example



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5 Configurable counts

are daily calculations, also known as vertical calculations. These calculations are configurable in the **ORTEC WS Client** by giving a daily calculation set the code TEAMSCHEDULER.

- It's only possible to use one calculation set for the entire organization.
- It might take up to 15 minutes for changes in the daily calculation set to be propagated to the Team Scheduler app.

Example

The **COUNTS** tab is always visible.

VACANT SHIFTS	STAFFING	COUNTS	Sun 2/4	Mon 2/5	Tue 2/6	Wed 2/7	Thu 2/8	Fri 2/9	Sat 2/10	Sun 2/11
Budget		176978	8138	5137	5280	5280	5280	5445	8365	8138
Costs		158108	7689	4816	4678	4358	4246	5517	7048	8194
Result		€ 18870	448	321	602	922	1034	-72	1317	-56
Shifts Total		897	31	33	33	30	30	33	29	31
Day shifts		315	11	11	11	10	10	11	10	11
Evening shifts		286	10	11	11	10	10	11	10	10
Night shifts		296	10	11	11	10	10	11	9	10
Work hours		6729:30	232:30	248:00	247:30	231:00	221:30	247:30	217:30	232:30
Skill - Admin			1-7	1-7	0-10	0-6	0-7	1-6	1-5	0-5
Number of vacant shifts			0	4	0	2	2	1	2	0

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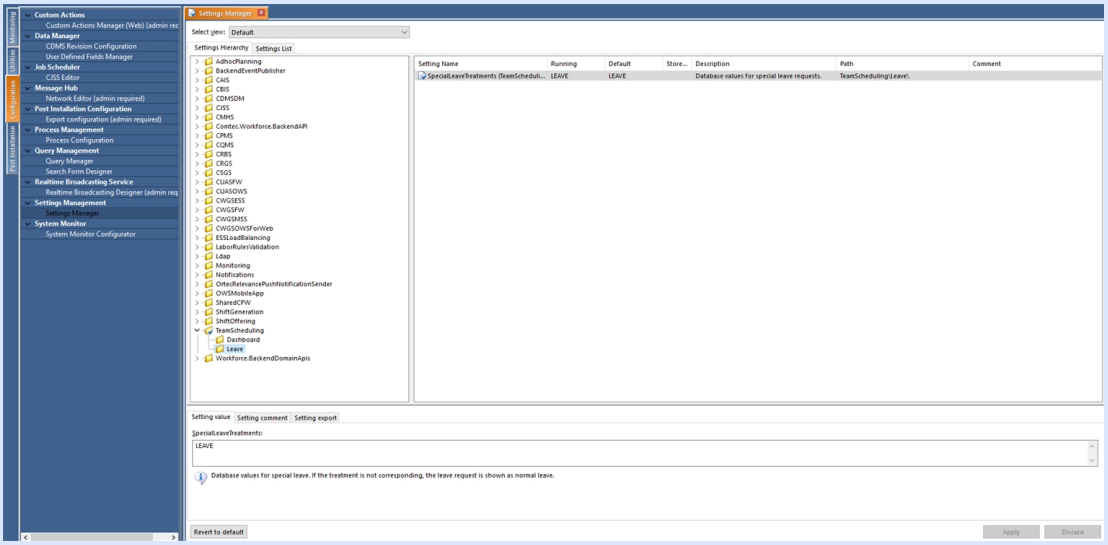
6 Special leave treatments

Leave requests on the dashboard are shown in two tabs: **LEAVE** and **SPECIAL LEAVE**.

To show the special leaves under the correct tab:

1. In **ORTEC System Configuration (CSCS)**, go to **Configuration › Settings Manager.**
2. Under **Settings Hierarchy**, select **TeamScheduling › Leave.**
3. In the **Setting value** field, enter the activity type treatments (comma separated if there are multiple values) that should be classified as special leave in the dashboard. The treatment value of an activity type can be found in the operational database of ORTEC WS. The default value for this setting is LEAVE.
4. Optionally, enter a comment under **Setting comment**.
5. Click **Apply**.

Example



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7 Sick leave properties

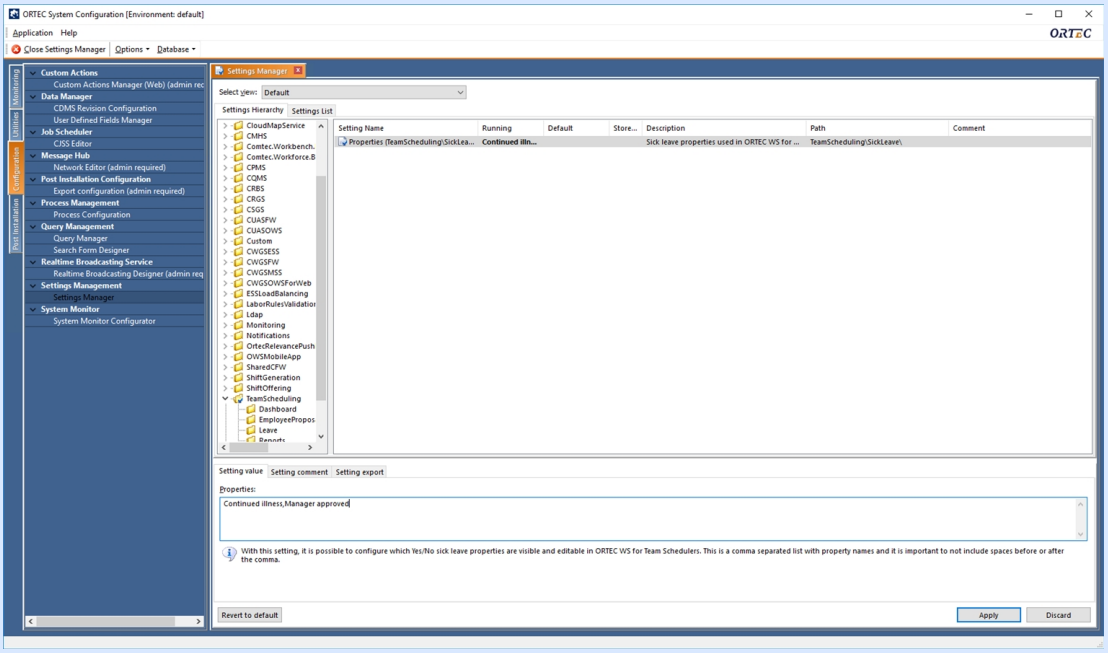
Sick leave properties allows organizations to accurately process sickness in calculations, payroll, and any reports based on sick leave data. The properties used depend on the organization's policies, compliance requirements, and administrative preferences. They can be toggled on or off when adding or editing sick leave and are displayed in the **Sick leave details** pane.

> You can only configure the properties if you have the 'Allowed to manage sick leave' permission. For more information, see "Permissions" on page 2.

To configure the available properties:

1. In **ORTEC System Configuration (CSCS)**, go to **Configuration** > **Settings Manager**.
2. Under **Settings Hierarchy**, select **TeamScheduling** > **SickLeave**.
3. In the **Setting value** tab > **Properties** field, enter the values (comma separated if there are multiple values) that should be added as sick leave properties.
4. Optionally, enter a comment under **Setting comment**.
5. Click **Apply**.

Example



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8 Number of schedules on dashboard

The number of schedules displayed in the **Schedules** tile of the dashboard is configurable. The default values are as follows:

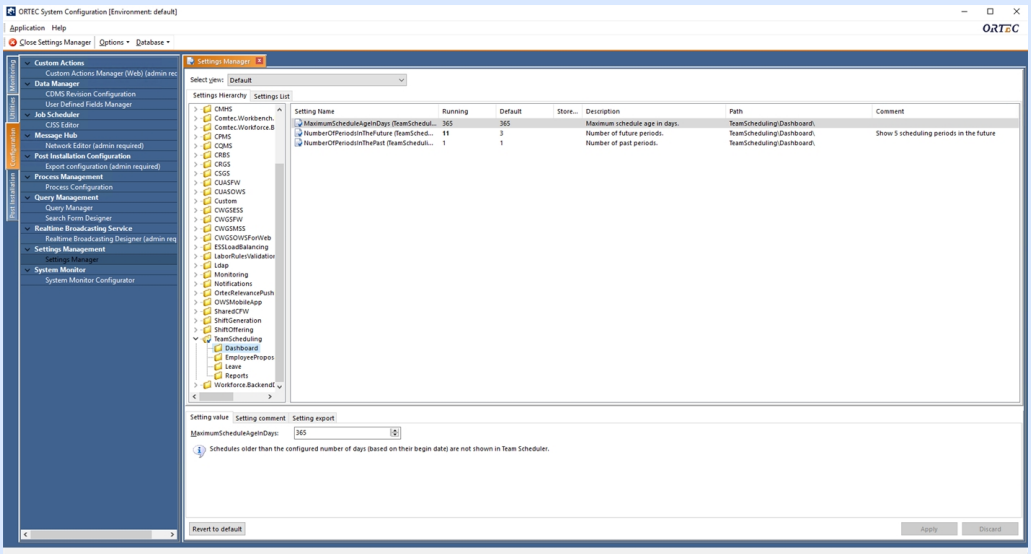
- Number of periods (schedules) in the past: 1
- Number of periods (schedules) in the future: 3

To change the default settings:

1. In **ORTEC System Configuration (CSCS)**, go to **Configuration** › **Settings Manager.**

2. Under **Settings Hierarchy**, select **TeamScheduling** › **Dashboard.**

Example



3. To configure the displayed number of schedules in the future, update the setting NumberOfPeriodsInTheFuture.

4. To configure the displayed number of schedules in the past, update the setting NumberOfPeriodsInThePast.

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5. Refresh the dashboard page to see the changes.

> It might take up to 15 minutes before the changes are reflected on the dashboard.

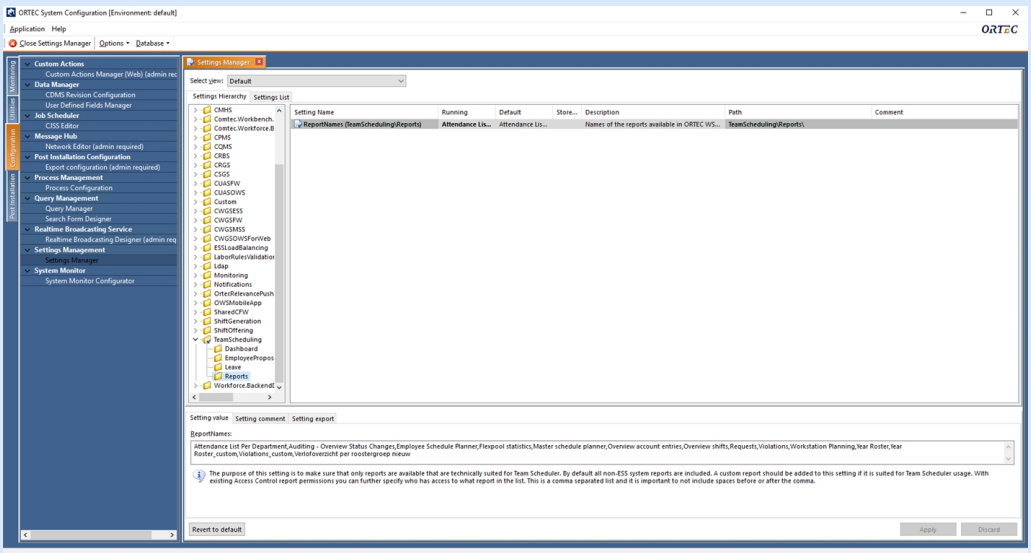
> In addition, the setting called TeamScheduling\Dashboard\MaximumScheduleAgeInDays makes sure that schedules older than the configured number of days will no longer be shown in Team Scheduler. The default value is 365 days. This setting also makes sure that the nightly refresh of calculations will not refresh old periods, leading to potential memory issues. Available as of ORTEC WS update level 1605853.

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9 Reports

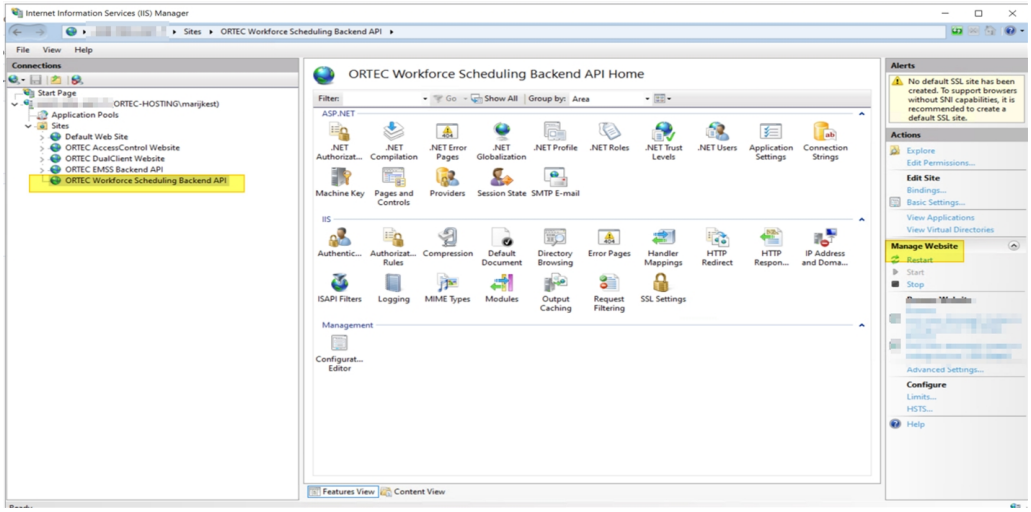
- Both system reports and custom reports are supported. The setting in **ORTEC System Configuration (CSCS)** called TeamScheduling\Reports\ReportNames dictates which reports are available. By default, this setting is filled with all non-ESS system reports. Custom reports can be added to the setting.

Example



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Restart the **ORTEC Workforce Scheduling Backend API** to make the added custom report(s) visible.



- The reports feature is behind the Team Scheduler permission Allowed to retrieve reports. Without this permission, the extra tab is not visible. Existing permissions on individual reports are used to determine what user can see which report. For more information, see "Permissions" on page 2.

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Contact information

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