

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

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ORTEC Workforce Scheduling 7

User Manual

Module MS Reporting



September 2025

e^x

$\frac{1}{\pi}$

$(k!)^4$

π

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Table of Contents

1	MS Reporting	1
1.1	System reports in MS Reporting format	1
2	System Reports	2
2.1	Overview ORTEC WS Client reports	2
2.2	Overview ORTEC WS for Employees reports	2
2.3	General MS Reporting functionality	2
3	Examples of the system reports	4
3.1	Attendance list per department	4
3.2	Auditing - Overview department status changes	5
3.3	Flexpool statistics	6
3.4	Master schedule	7
3.5	Overview account entries	9
3.6	Overview shifts	10
3.7	Personal schedule	11
3.8	Requests	12
3.9	Violations	13
3.10	Workstation Planning	14
3.11	Year schedule	15
3.12	Account for employee ESS	16
3.13	Master schedule ESS	17
3.14	Overview shift reassignments ESS	18
3.15	Personal schedule ESS	19
3.16	Self scheduling ESS	20
4	Add system reports in ORTEC WS	21
4.1	Assign report authorizations	21
4.2	Add reports to the menu bar	22



1 MS Reporting

1.1 System reports in MS Reporting format

We'll cover all system reports, giving brief descriptions and explaining MS Reporting's general functions. Next, we'll dive into detailed information and report examples. Finally, we'll explain how to add reports in ORTEC Workforce Scheduling (ORTEC WS) if they're not visible. Besides system reports, there are also example reports accessible for use in ORTEC WS.

2 System Reports

Here you'll find an overview of the existing reports including a short description. We'll conclude by explaining the MS reporting functionality in general.

2.1 Overview ORTEC WS Client reports

Report	Short description
Attendance list per department	Overview shifts per department
Auditing - Overview department status changes	Overview of the status changes of departments
Flexpool statistics	Overview of Flexpool statistics
Master schedule	Overview of the department schedule
Overview account entries	Overview of account balances (per department or per employee)
Overview shifts	Overview of shift assignments per day
Personal schedule	Overview of assigned shifts per employee
Requests	Overview of requests per department
Violations	Overview of violations per department
Workstation planning	Overview workstation assignments per day
Year schedule	Overview of year schedule per employee

2.2 Overview ORTEC WS for Employees reports

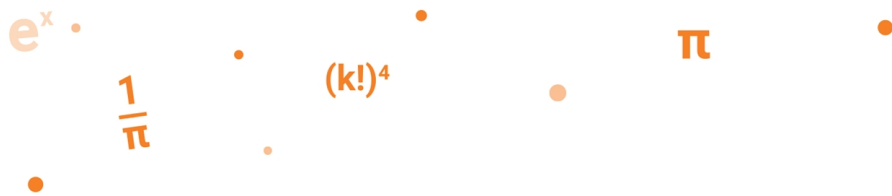
Report	Short description
Account for employee	Overview of account balances of the employee
Master schedule	Overview of the schedule of the department of the employee
Overview shift reassignments	Overview of shift reassignments of the employee
Personal schedule	Overview of the personal schedule of the employee
Self Scheduling	Overview of the schedule for each round of the self scheduling process

2.3 General MS Reporting functionality

The following functionality is available for every MS Reporting report in the header when opening a report:



- Go to the next, the last, the previous or the first page
- Back
- Stop running the report



- Refresh the report
- Print the report
- Print Layout
- Page Setup
- Export the report to XML, CSV, PDF, MHTML, Excel. TIFF or word file.
- Zoom
- Find text in report

In some reports it is possible to interactively sort, filter, expand and/or collapse data in the report.

An option “Allow multiple windows” is available in ORTEC WS to allow you to open multiple reports at the same time. If this option is not visible in your configuration, you can add this option through the customize menu. See paragraph “Adding reports to the menu bar” for more information.

3 Examples of the system reports

3.1 Attendance list per department

This report provides an overview of the shifts per department.

Example

Attendance list per department

From date: 12/7/2020 To date: 12/8/2020 View Report

Department: 9 - Drivers Employees: Aernouts, B., Albert, J.M., Ap

Show employee as: Name, initials, prefix Activities: Work

Show function: No Show short signature: No

Page Of 1 100% Find | Find Next

Attendance list per department
 Department: 9 - Drivers
 Date: 12/7/2020

Shift	From - To	Activity	From - To	Employee	Description
119D	08:00 - 12:00	Work	08:00 - 12:00	Fokker, M.	
119H	08:00 - 12:00	Work	08:00 - 12:00	Everwennink, E.	
125	18:00 - 22:30	Work	18:00 - 22:30	Garrison, M.	Normal vehicle
131D	10:00 - 16:00	Work	10:00 - 16:00	Perez, W.	
131H	10:00 - 16:00	Work	10:00 - 16:00	Boorsma, J. King, F.	
1549D	06:00 - 16:00	Work	06:00 - 16:00	Coulistay, A.	
1549H	06:00 - 16:00	Work	06:00 - 16:00	Aernouts, B.	Long vehicle
1284	11:00 - 16:30	Work	11:00 - 16:30	Deitman, A., van	Normal vehicle
1972	07:30 - 17:30	Work	07:30 - 17:30	Miller, A.	Normal vehicle
1441	07:00 - 10:00	Work	07:00 - 10:00	Garrison, M.	Normal vehicle

Close

Options	Explanation
From and to date	Period filter.
Department	Department filter.
Employees	Employee filter.
Show employee as	Name, initials, prefix; First name, prefix, name; employee number.
Activities	All available activities in the selected period or possible to choose. Shifts without any of the chosen activities are not shown in the report.
Show function	Employee function.
Show short signature	Select Yes to show a column for short signatures and select No to hide this column.

3.2 Auditing - Overview department status changes

This report provides an overview of the status changes of departments. Departments can have different statuses (planning, published, closed, approved, processed). This report shows which user has changed the department status.

Example
Auditing - Overview status changes
— □ ×

From date: To date: View Report

Department:

Page Of 1 | 100% | Find | Find Next

Auditing - Overview Status Changes
Period: 7/1/2020 to 8/1/2020

Department	Status change	Date change	User	Original date	Adjusted date
7 - Retail	Published until	7/29/2020 23:14	admin	7/13/2020	8/10/2020
		7/29/2020 23:14	admin	6/15/2020	7/13/2020
		7/29/2020 23:13	admin	7/13/2020	8/10/2020
		7/29/2020 23:13	admin	8/10/2020	7/13/2020
		7/29/2020 23:11	admin	7/13/2020	8/10/2020
		7/29/2020 23:11	admin	6/15/2020	7/13/2020
		7/29/2020 23:11	admin	7/13/2020	8/10/2020
		7/29/2020 23:11	admin	8/10/2020	7/13/2020
		7/29/2020 23:08	admin	7/13/2020	8/10/2020
		7/29/2020 23:08	admin	6/15/2020	7/13/2020
		7/29/2020 23:08	admin	7/13/2020	8/10/2020
		7/29/2020 23:06	admin	8/10/2020	7/13/2020
		7/29/2020 18:21	admin	7/13/2020	8/10/2020
		7/29/2020 18:17	admin	8/10/2020	7/13/2020

Close

Options	Explanation
From and to date	Period filter.
Department	Department filter.

The adjusted date is shown with a red background color if the status of a period is set back.

3.3 Flexpool statistics

This report provides an overview of the Flexpool statistics. An overview is shown with the number of shifts that are subcontracted to the Flexpool department(s) and an overview of the statuses of the subcontracted shifts.

Example

Flexpool statistics

From date: 10/1/2020 To date: 11/1/2020 View Report

Department: 3 - Flexpool Status: Canceled, Declined, Pending

Show details table: Yes Show details expanded: Yes

Page Of 1 | 100% | Find | Find Next

Flexpool statistics
Period: 10/1/2020 to 11/1/2020

Summary

Subcontracted to department	Subcontracting department	Pending		Final planning	Total
3 - Flexpool	2 - Department+	0		1	100%
	7 - Retail	2	100%	0	2
Total		2	67%	1	33%

Subcontracted to 3 - Flexpool

Subcontracting department	Cost center (of shift)	Date	Begin - end	Shift	Status	Employee	Preference satisfied
2 - Department+	52041	10/19/2020	07:30 - 16:00	D	Final planning	Mink, S.	
7 - Retail		10/28/2020	06:30 - 15:00	F1	Pending		
		10/29/2020	06:30 - 16:00	F1	Pending		

12/9/2020 10:10:30 AM Flexpool statistics 1/1

Close

Options	Explanation
From and to date	Period filter.
Department	Department filter. Flexpool departments can be selected only.
Show details table	Select Yes to show the details of shifts subcontracted to the flexpool department. Select No to show the summary only.
Show details expanded	Select Yes to show the details table expanded. select No to show the details table collapsed.

3.4 Master schedule

This report provides an overview of the department schedule.

Example

Master schedule

From date: 12/1/2020 To date: 1/1/2021 View Report

Department: Materials handling Column size: Small

Show shift: Shift name Show duty color: Duty color 1

Show employee as: Name, initials, prefix Sort on: Employee name

Show Calculations: Yes Show employees without shifts: No

Show memo: No Show shifts other departments: Yes

Show vacant shifts: No Employee calculations: -Working hours ENG (Small)

Calculations: Worktime Sort employees without grouplabel: on the top

Filter on grouplabel: Without grouplabel

Page Of 1 Find Find Next

Master Schedule
 Department: Materials handling
 Period: 12/1/2020 to 1/1/2021
 Status: 6/10/2020 to 1/1/2021: Published

	49					50					51					52					53				Planned hours in this scheduling period			
	Tue	Wed	Thu	Fri	Sat	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Mon		Tue	Wed	Thu
Anderson, W.	Duty1	Duty1	Duty1	Duty1	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	96.00
Doe, J.	Duty1	Duty1	Duty1	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	120.00
Jackson, R.	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	96.00
Miller, D.				Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	28.00	
Moore, C.				Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty1	Duty1	Duty1	Duty1	112.00	
Taylor, J.	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	100.00	
Thomas, A.	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	68.00	
White, D.	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	124.00	
Wilson, A.	Duty2	Duty2	Duty2	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty2	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	Duty1	124.00	

12/1/2020 9:50:05 AM Master Schedule 1/1

Close

Options	Explanation
From and to date	Period filter.
Department	Department filter.
Show shift	Indicate how shifts should be presented in the schedule: shift names, begin and end times, shift names and begin and end times.
Show duty color	Select Yes to show duty color 1 as background color for shifts. Select No to not show duty colors.
Show employee as	Indicate how your employees should be presented in the schedule: last name, initials and prefix, or first name, prefix and name, or employee number.
Sort on	Sort on employee name or grouplabel, employee name.
Show calculations	Select Yes to show calculations that are selected in the parameter Employee Calculations. Select No to not show calculations.
Column size	Indicate the column size in the report: small, medium or wide.
Employee calculations	Select a set of calculations to show. In the parameter Calculations it is possible to select which field of the calculation set should be shown.
Sort employees without grouplabel	The employees without a grouplabel can be shown on the top or on the bottom.
Calculations	Select the calculations to show. The calculations marked with * are not shown in the report, because it is not possible to check the calculation permissions of the user.
Filter on grouplabel	Select the grouplabel(s) to show.

Options	Explanation
Show employees without shifts	Select Yes to show employees without shifts. Select No if you want to hide employees without shifts.
Show memo	Select Yes to show memos on the report. Select No if you don't want to show memos.
Show shifts other departments	Select Yes to show the shifts assigned to employees in other departments than the selected department. These shifts will be presented in Italic font and are colored gray.
Show vacant shifts	Select Yes to show vacant shifts on the report. Select No if you don't want to show vacant shifts on the report.

3.5 Overview account entries

This report provides an overview of the entries on an account.

Example

Overview account entries
— □ ×

Department: Materials handling

From date: 1/1/2020

Employees: Anderson, W., Doe, J., Jacksc

Include only entries for the selected department(s) in the total: Yes

Show hours: No

Account: All hours

To date: 1/1/2021

Show report kind: Per employee

Show details: No

[View Report](#)

Page Of 1
100%
Find | Find Next

Overview account entries

Department: Materials handling

Period: 1/1/2020 to 1/1/2021

Account: All hours

Account categories name	Value
Hours	429.00
Total	429.00

Employee	Employee number	Department	Account categories name	Value
Anderson, W.	200027			129.00
			Total	129.00
				129.00
Doe, J.	200003			180.00
			Total	180.00
				180.00
Jackson, R.	200029			120.00
			Total	120.00
				120.00
Total				429.00

12/11/2020 10:28:39 AM
 Overview account entries
1/1

[Close](#)

Options	Explanation
Department	Department filter
Account	Account filter
From and to date	Period filter
Employees	Employee filter
Show report kind	Show account entries per employee or per department
Include only entries of selected department(s) in the total	Select Yes to see only account category values entered on the department that was selected in the department filter. Select No to see all account category values of the selected employees, including values for other departments.
Show details	Select Yes to show the different account category values per employee and select No to see only the total value per employee when running the report. After running the report you will be able to adjust the level of detail.
Show hours	Select Yes to show a column with hours next to the column with the value. Select No to hide this column.

Interactive option to expand / collapse information.

3.6 Overview shifts

This report provides an overview of the shift assignments for a period.

Example
Overview shifts

From date:

Department:

Show employee as:

Show shifttime: Yes No

To date:

Activities:

Show duty color:

Show employees from other departments: Yes No

[View Report](#)

Page Of 1
Find | Find Next

Overview shifts

Department: Materials handling

Period: 12/7/2020 to 12/14/2020

		Week 50							
		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
		07-12-2020	08-12-2020	09-12-2020	10-12-2020	11-12-2020	12-12-2020	13-12-2020	
Duty1	Materials handling	09:00 - 13:00	Jackson, R.	Jackson, R.	Jackson, R.	Jackson, R.	Jackson, R.	Doe, J.	Doe, J.
			Moore, C.	Moore, C.	Moore, C.	Moore, C.	Moore, C.	Jackson, R.	Jackson, R.
			Taylor, J.	Taylor, J.	Taylor, J.	Taylor, J.	Taylor, J.	Taylor, J.	Taylor, J.
			Wilson, A.	Wilson, A.	Wilson, A.	Wilson, A.	White, D.	White, D.	White, D.
Duty2	Materials handling	13:00 - 17:00	Anderson, W.	Anderson, W.	Anderson, W.	Anderson, W.	Anderson, W.	Moore, C.	Moore, C.
			Doe, J.	Doe, J.	Doe, J.	Doe, J.	Doe, J.	Thomas, A.	Thomas, A.
			White, D.	White, D.	White, D.	White, D.	Wilson, A.	Wilson, A.	Wilson, A.

12/11/2020 10:32:37 AM Overview shifts 1/1

[Close](#)

Options	Explanation
From and to date	Period filter
Department	Department filter
Activities	Select the activities that should be shown in the report.
Show employee as	Name, initials, prefix; first name, prefix, name; employee number
Show duty color	Select duty color 1, duty color 2 or none.
Show shift time	Select Yes to show the begin- and end time of the shifts. Select No to hide this column.
Show employees from other departments	Select Yes to show employees from other departments. These employees are shown <i>italic</i> .

3.7 Personal schedule

This report provides an overview of the personal schedule of an employee.

Example
Personal schedule
— □ ×

From date:

Department:

Show workstation:

To date:

Employees:

[View Report](#)

Page Of 1 | 100% | Find | Find Next

Employee Schedule

Employee: Doe, J.

Period: 12/11/2020 to 12/18/2020

Roster status: 6/10/2020 to 1/1/2021: Published

Date	Department	From - To	Shift	Description	From - To	Activity
12/11/2020	Materials handling	13:00 - 17:00	Duty2		13:00 - 17:00	Materials handling
12/12/2020	Materials handling	09:00 - 13:00	Duty1		09:00 - 13:00	Materials handling
12/13/2020	Materials handling	09:00 - 13:00	Duty1		09:00 - 13:00	Materials handling
12/14/2020	Materials handling	09:00 - 13:00	Duty1		09:00 - 13:00	Materials handling
12/15/2020	Materials handling	09:00 - 13:00	Duty1		09:00 - 13:00	Materials handling
12/16/2020	Materials handling	09:00 - 13:00	Duty1		09:00 - 13:00	Materials handling
12/17/2020	Materials handling	09:00 - 13:00	Duty1		09:00 - 13:00	Materials handling

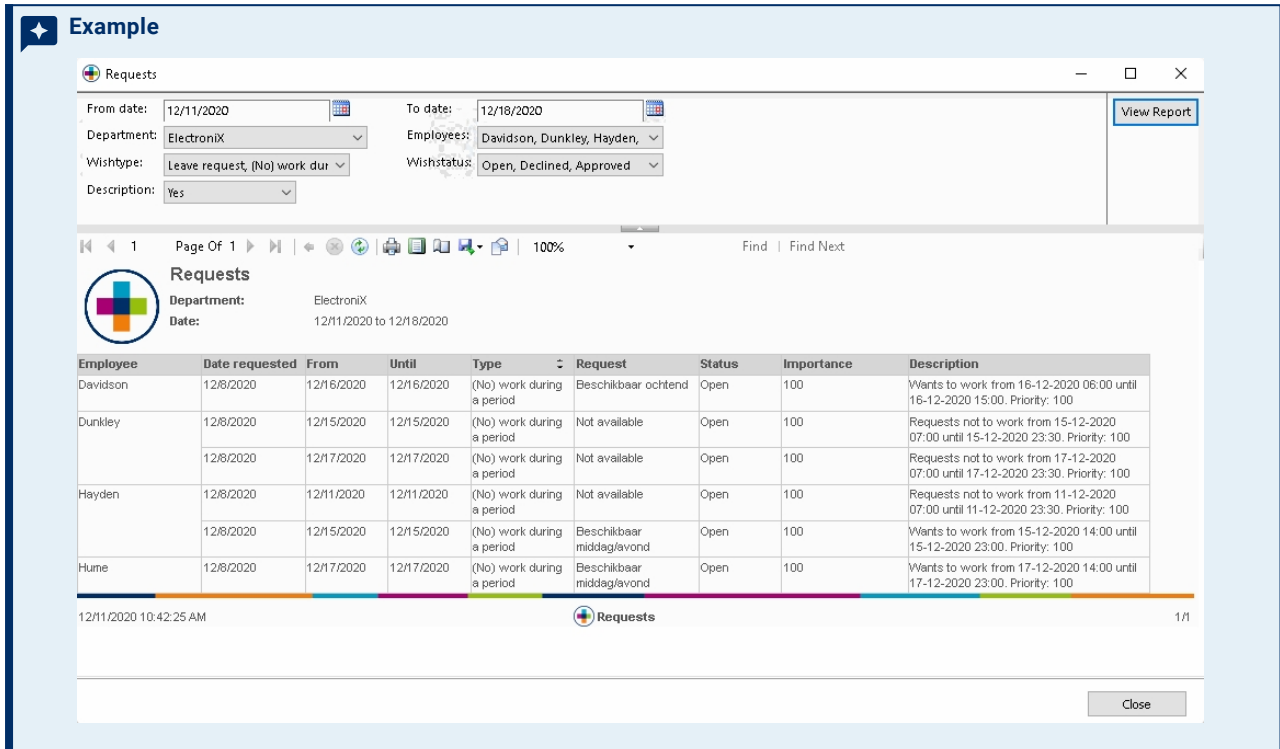
12/11/2020 10:36:39 AM
 Employee Schedule
1/1

[Close](#)

Options	Explanation
From and to date	Period filter.
Department	Department filter.
Employees	Employee filter.
Show workstation	Select Yes to show the workstation of the activity. Select No to hide the workstation.

3.8 Requests

This report provides an overview of the requests.



Options	Explanation
From and to date	Period filter.
Department	Department filter.
Employees	Employee filter.
Wishtype	Wishtype filter.
Description	Select Yes to show the description of the request. Select No to hide the description.

3.9 Violations

This report provides an overview of the violations. These violations are related to the linked labor-time rules of employees.

Example

Violations
- □ ×

From date:

Department:

To date:

Employees:

[View Report](#)

Page Of 1
Find | Find Next

Violations

Department: ElectroniX

Period: 11-12-2020 to 18-12-2020

Employee	Date	Shift	Requirement	Description violation
Hume	12/13/2020		7 Recurring Wfsh Sunday	Request to work between 13-12-2020 07:00 and 13-12-2020 15:00 is not acknowledged. [Requests, 7 Recurring Wfsh Sunday]
Matthams	12/12/2020		6 Recurring Wfsh Saturday	Request to work between 12-12-2020 11:00 and 12-12-2020 15:00 is not acknowledged. [Requests, 6 Recurring Wfsh Saturday]
Stokes	12/15/2020	MW2	Forbidden: 12 hours per day	15-12, MW2: The number of hours worked on this day is larger than 12:00. [Labor-rules KPI BDP, Forbidden: 12 hours per day]
	12/15/2020	MW2	CLA: 10 hours per day	15-12, MW2: The number of hours worked on this day is larger than 10:00. [Labor-rules KPI BDP, CLA: 10 hours per day]
	12/15/2020	MW2	Legislation: Daily rest	15-12, MW2: There is not sufficient rest in a period of 24:00 hours. [Labor-rules KPI BDP, Legislation: Daily rest]

12/11/2020 11:43:28 AM
 Violations
1/1

[Close](#)

Options	Explanation
From and to date	Period filter.
Department	Department filter.
Employees	Employee filter.

3.10 Workstation Planning

This report provides an overview of the workstation assignments per day.

Example

Workstation planning

From date: 12/14/2020 To date: 12/21/2020 View Report

Department: Materials handling Show employees without workstations: No

Show employee name as: Firstname Show workstation color: No

Show workstation description: No

Page Of 1 100% Find | Find Next

Workstation planning
 Department: Materials handling
 Date: 12/14/2020 to 12/21/2020

		Week 51							
		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
		12/14/2020	12/15/2020	12/16/2020	12/17/2020	12/18/2020	12/19/2020	12/20/2020	
Production line 8	Materials handling	09:00 - 13:00	David John Joseph Ryan	David John Joseph Ryan	David John Joseph Ryan	David John Joseph Ryan	David John Joseph Ryan	Anthony John Joseph Ryan	Anthony John Joseph Ryan
	Packaging	13:00 - 17:00	Alexander Anthony Christopher	Alexander Anthony Christopher	Alexander Anthony Christopher	Alexander Anthony Christopher	Anthony Christopher William	Christopher David William	Christopher David William

12/11/2020 11:50:10 AM Workstation planning 1/1

Close

Options	Explanation
From and to date	Period filter.
Department	Department filter.
Show employees without workstations	Select Yes to show the employees without a workstation and No to hide these employees.
Show employee name as	Firstname; firstname & name; name, initials.
Show workstation color	Yes to show the workstation color (Maintenance, location and workstations, tab workstations, color) and No to hide this color.
Show workstation description	Yes to show the description of a workstation (Maintenance, location and workstations, tab workstations, field description) and No to hide this description.

3.11 Year schedule

This report provides an overview of the year schedule of a department per employee.

Example
Year schedule

Year:

Employees:

Show shifts other departments:

Department:

Column size:

[View Report](#)

Page Of 1 | 100% | Find | Find Next

Year roster

Employee: Doe, J.
Year: 2020
Roster status: 1/1/2020 to 9/1/2020: Published
9/1/2020 to 2/1/2021: Plan

Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
January		Duty 1	Duty 2	Duty 2	Duty 1			Duty 1	Duty 2	Duty 2	Duty 1		Duty 1	Duty 2	Duty 2	Duty 1				Duty 1	Duty 2	Duty 2	Duty 1		Duty 1	Duty 2	Duty 2	Duty 1		Duty 1	
February				Duty 2	Duty 1	Duty 2	Duty 1	Duty 2				Duty 2	Duty 1	Duty 2	Duty 1	Duty 2		Duty 2	Duty 1	Duty 2	Duty 1	Duty 2			Duty 2	Duty 2	Duty 2	Duty 2	Duty 2		
March			Duty 1	Duty 1	Duty 1	Duty 1					Duty 2	Duty 2	Duty 2	Duty 2				Duty 1	Duty 1	Duty 1	Duty 1		Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 2	Duty 2		
April		Duty 1	Duty 1	Duty 1	Duty 1			Duty 2	Duty 2	Duty 2	Duty 2	Duty 2			Duty 1	Duty 1	Duty 1	Duty 1	Duty 1			Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 1		
May			Duty 1	Duty 1		Duty 2	Duty 2	Duty 2	Duty 2			Duty 1	Duty 1	Duty 1	Duty 1					Duty 1	Duty 1	Duty 1	Duty 1		Duty 2	Duty 2	Duty 2	Duty 2	Duty 2		
June		Duty 1	Duty 1	Duty 1		Duty 2	Duty 2	Duty 2	Duty 2			Duty 2	Duty 2	Duty 2				Duty 1	Duty 1	Duty 1	Duty 1				Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 1	
July	LOA	LOA	LOA			LOA	LOA	LOA	LOA			LOA			V	Duty 1	Duty 1			Duty 2	Duty 2	Duty 2	Duty 2		Duty 2	Duty 2	Duty 2	Duty 2	Duty 2		
August			Duty 1	Duty 1	Duty 1	Duty 1						Duty 1	Duty 1	Duty 1	Duty 1	Duty 1				Duty 1	Duty 1	Duty 1	Duty 1			Duty 2	Duty 2	Duty 2	Duty 2		
September								Duty 2	Duty 1	Duty 2	Duty 2			Duty 2	Duty 1	Duty 2	Duty 2			Duty 2	Duty 1	Duty 2	Duty 2			Duty 2	Duty 1	Duty 2	Duty 2		
October			Duty 1	Duty 2	Duty 1	Duty 2	Duty 2			Duty 1	Duty 2	Duty 1	Duty 2	Duty 2			Duty 1	Duty 2	Duty 1	Duty 2	Duty 2		Duty 1	Duty 2	Duty 1	Duty 2	Duty 2		Duty 1	Duty 2	
November			Duty 2	Duty 1	Duty 1	Duty 2			Duty 2	Duty 1	Duty 1	Duty 2			Duty 2	Duty 1	Duty 2			Duty 2	Duty 1	Duty 2				Duty 2	Duty 1	Duty 1	Duty 2	Duty 2	
December		Duty 1	Duty 1	Duty 1	Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 2	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	Duty 1		Duty 1	Duty 1	Duty 1	Duty 1	Duty 1	

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Year roster
1/1

[Close](#)

Options	Explanation
Year	Year filter.
Department	Department filter.
Column size	Small, medium or wide.
Show shifts other departments	Select Yes to show shifts from other departments. These shifts are shown in light gray.

Shifts on holidays have an orange color. The weekend days have a background color.

3.12 Account for employee ESS

This report provides an overview of the account entries for an employee.

Example

Account category	Entry Date	Hours	Value
01 Contracturen	1/1/2024	51.07	-51.07
	2/1/2024	48.40	-48.40
	3/1/2024	48.40	-48.40
	4/1/2024	48.53	-48.53
	5/1/2024	48.53	-48.53
	6/1/2024	44.27	-44.27
	7/1/2024	48.40	-48.40
	8/1/2024	48.53	-48.53
Total		382.13	-382.13
02 Week	1/1/2024	8.00	8.00
	1/12/2024	8.00	8.00
	1/17/2024	8.00	8.00
	1/19/2024	8.00	8.00
	1/20/2024	8.00	8.00
	1/22/2024	8.00	8.00
	1/23/2024	8.00	8.00
	1/24/2024	8.00	8.00
	1/25/2024	7.30	7.30
	2/13/2024	9.00	9.00
	2/15/2024	9.00	9.00
	2/16/2024	8.00	8.00
	2/19/2024	8.00	8.00
	2/20/2024	8.00	8.00
2/22/2024	8.00	8.00	
2/23/2024	8.00	8.00	
2/26/2024	8.00	8.00	
2/27/2024	8.00	8.00	
2/29/2024	8.00	8.00	
3/8/2024	3.00	3.00	

Options	Explanation
From and to date	Period filter.
Account	Account filter.
Show decimals	Select Yes to show decimals.
Show description	Select Yes to show the description. Select No to hide this column.
Show hours	Select Yes to show a column with hours. Select No to hide this column.
Show weight	Select Yes to show a column with weight, expressed in percentage. Select No to hide this column.
Show details	Select Yes to show the different account category values and select No to see only the total value when running the report. After running the report you will be able to adjust the level of detail.
Show total account	Select Yes to show the account total at the bottom of the value column. Select No to see only the values per account category.

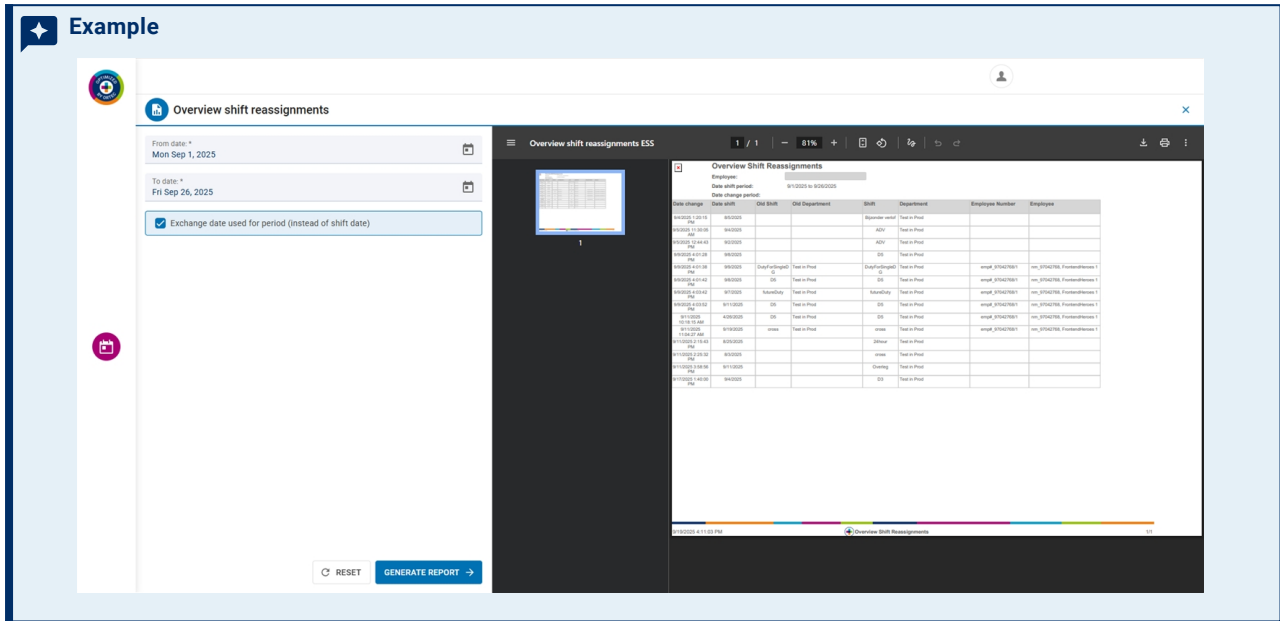
3.13 Master schedule ESS

This report provides an overview of the schedule of the department of the employee.

Options	Explanation
From and to date	Period filter.
Show shift	Indicate how shifts should be presented in the schedule: shift names, begin and end times, or shift names and begin and end times.
Show duty color	Select Yes to show duty color 1 as background color for shifts. Select No to not show duty colors.
Column size	Indicate the column size in the report: small, medium, or wide.
Show employee as	Indicate how your employees should be presented in the schedule: last name, initials and prefix, or first name, prefix and name, or employee number.
Department	Department filter.
Sort on	Sort on employee name or grouplabel, employee name.
Sort employees without grouplabel	The employees without a grouplabel can be shown on the top or on the bottom.
Filter on grouplabel	Select the grouplabel(s) to show.
Show memo	Select Yes to show memos on the report. Select No if you don't want to show memos.
Show vacant shifts	Select Yes to show vacant shifts on the report. Select No if you don't want to show vacant shifts on the report.
Show shifts other departments	Select Yes to show the shifts assigned to employees in other departments than the selected department. These shifts will be presented in Italic font and are colored gray.
Show employees without shifts	Select Yes to show employees without shifts. Select No if you want to hide employees without shifts.

3.14 Overview shift reassignments ESS

This report provides an overview of the shift reassignments of the employee.



Options	Explanation
From and to date	Period filter.
Exchange date used for period (instead of shift date)	Select Yes to use the date that the shift has changed for the selected period. Select No to use the date of the shift for the selected period.



3.15 Personal schedule ESS

This report provides an overview of the personal schedule of the employee.

Example

Personal schedule

From date: *
Mon Sep 1, 2025

To date: *
Fri Sep 26, 2025

Show workstation

Employee Schedule ESS

Employee: [redacted]
 Period: 9/1/2025 to 9/26/2025
 Roster status: Test in Prod: 7/1/2023 to 10/1/2025 - Published
 TestDepartment: 2/13/2025 to 12/1/2025 - Plan Attention: Shifts in schedules with status plan are not shown

Date	Department	From - To	Shift	Description	From - To	Activity	Workstation
9/1/2025	Test in Prod	08:00 - 15:30	futureDuty	-	08:00 - 12:30	Werk	
					12:30 - 15:30	Werk	
9/2/2025	Test in Prod	03:00 - 04:00	adv	th 4	03:00 - 04:00	Werk	
		09:00 - 17:00	ADV		09:00 - 17:00	Rocosterwij	
9/3/2025	Test in Prod	00:00 - 04:00	D5		00:00 - 02:00	Werk	
					02:00 - 03:00	Pauze betaald	
					03:00 - 04:00	Werk	
9/4/2025	Test in Prod	00:00 - 07:00	D3		00:00 - 07:00	Rocosterwij	
		09:00 - 17:00	ADV		09:00 - 17:00	Rocosterwij	
9/5/2025	Test in Prod	00:00 - 04:00	D5		00:00 - 02:00	Werk	
					02:00 - 03:00	Pauze betaald	
					03:00 - 04:00	Werk	
9/6/2025							
9/7/2025	Test in Prod	08:00 - 15:30	futureDuty	-	08:00 - 12:30	Werk	
					12:30 - 15:30	Werk	
9/8/2025	Test in Prod	00:00 - 04:00	D5		00:00 - 02:00	Werk	
					02:00 - 03:00	Pauze betaald	
					03:00 - 04:00	Werk	
9/9/2025	Test in Prod	00:00 - 05:00	DutyForSi	-	00:00 - 05:00	Werk	
9/10/2025							
9/11/2025	Test in Prod	00:00 - 04:00	D5		00:00 - 02:00	Werk	
					02:00 - 03:00	Pauze betaald	
					03:00 - 04:00	Werk	
		09:00 - 12:00	Overleg		09:00 - 12:00	Rocosterwij	
9/12/2025	Test in Prod	00:00 - 04:00	D5		00:00 - 02:00	Werk	
					02:00 - 03:00	Pauze betaald	
					03:00 - 04:00	Werk	

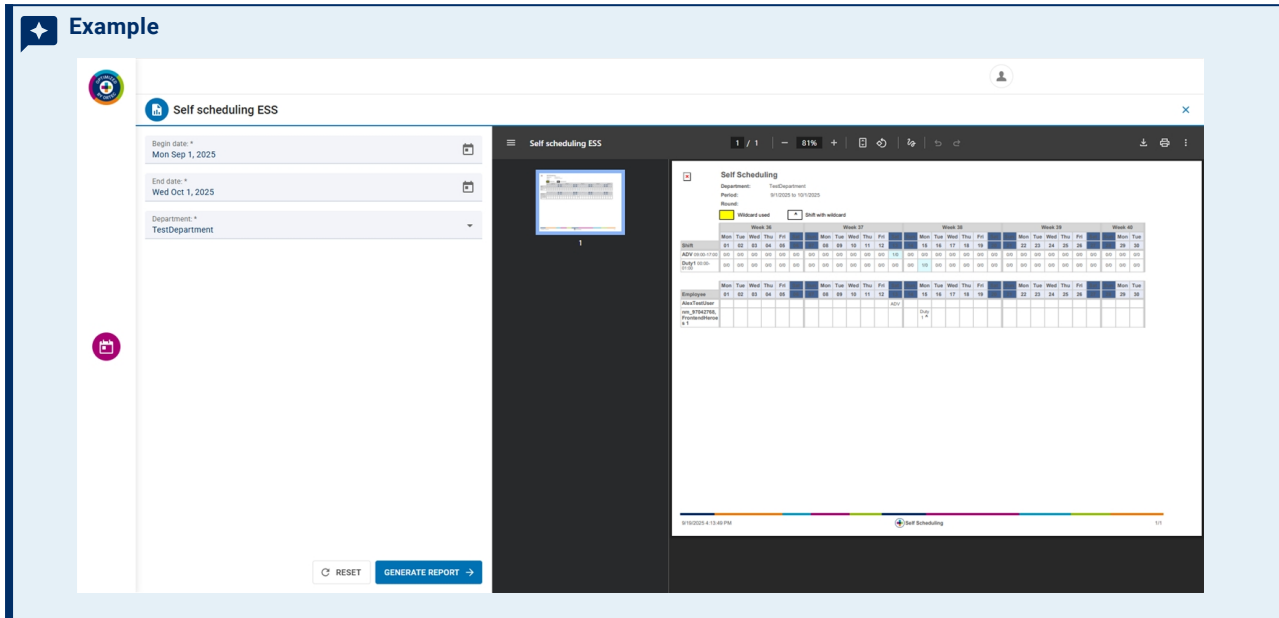
Options	Explanation
From and to date	Period filter.
Show workstation	Select Yes to show the workstation of the activity. Select No to hide the workstation.

19 User Manual Module MS Reporting
Examples of the system reports

ORTEC Workforce Scheduling 7
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3.16 Self scheduling ESS

This report provides an overview of the schedule for each round of the self scheduling process.



Options	Explanation
From and to date	Period filter.
Department	Department filter.

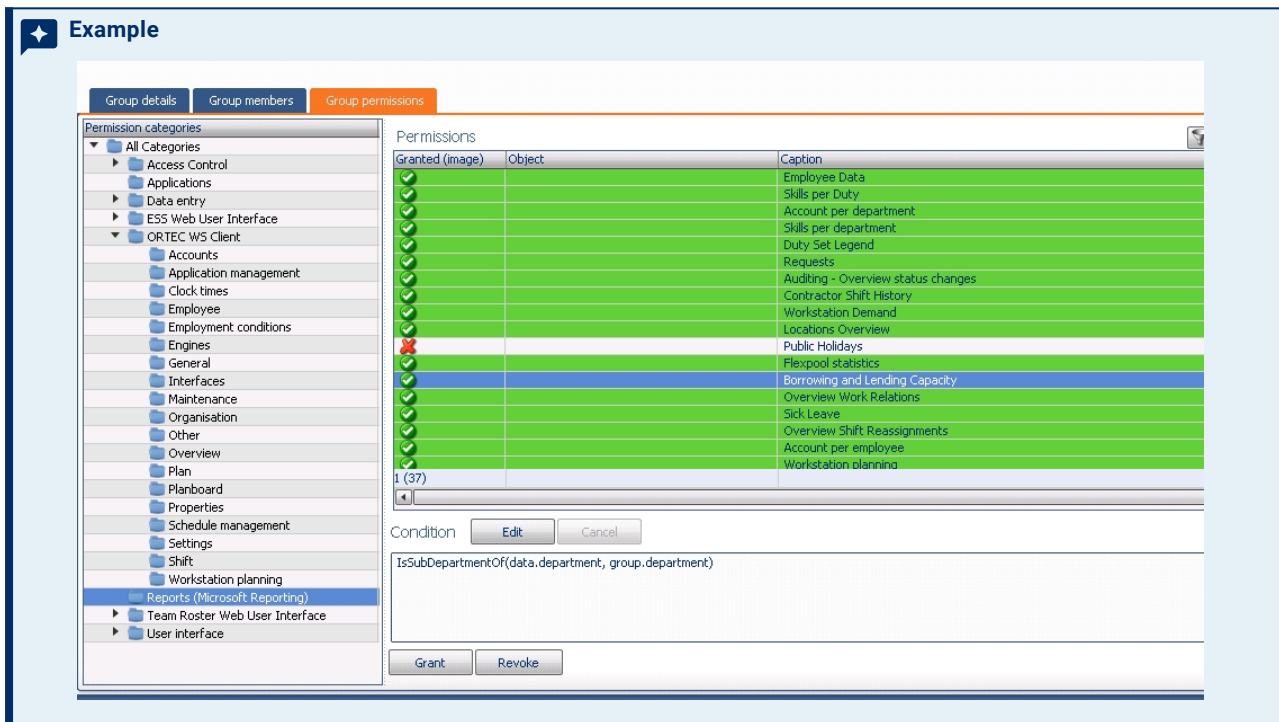
4 Add system reports in ORTEC WS

4.1 Assign report authorizations


Before you can actually open reports in ORTEC WS, report authorizations need to be assigned to the user(s).

When reports are uploaded to ORTEC WS, the system automatically adds an authorization for the report. These authorizations are available in Access Control in the category Reports (Microsoft Reporting).

For system reports the name of the report authorization is in Access Control the same as the name of the uploaded report.



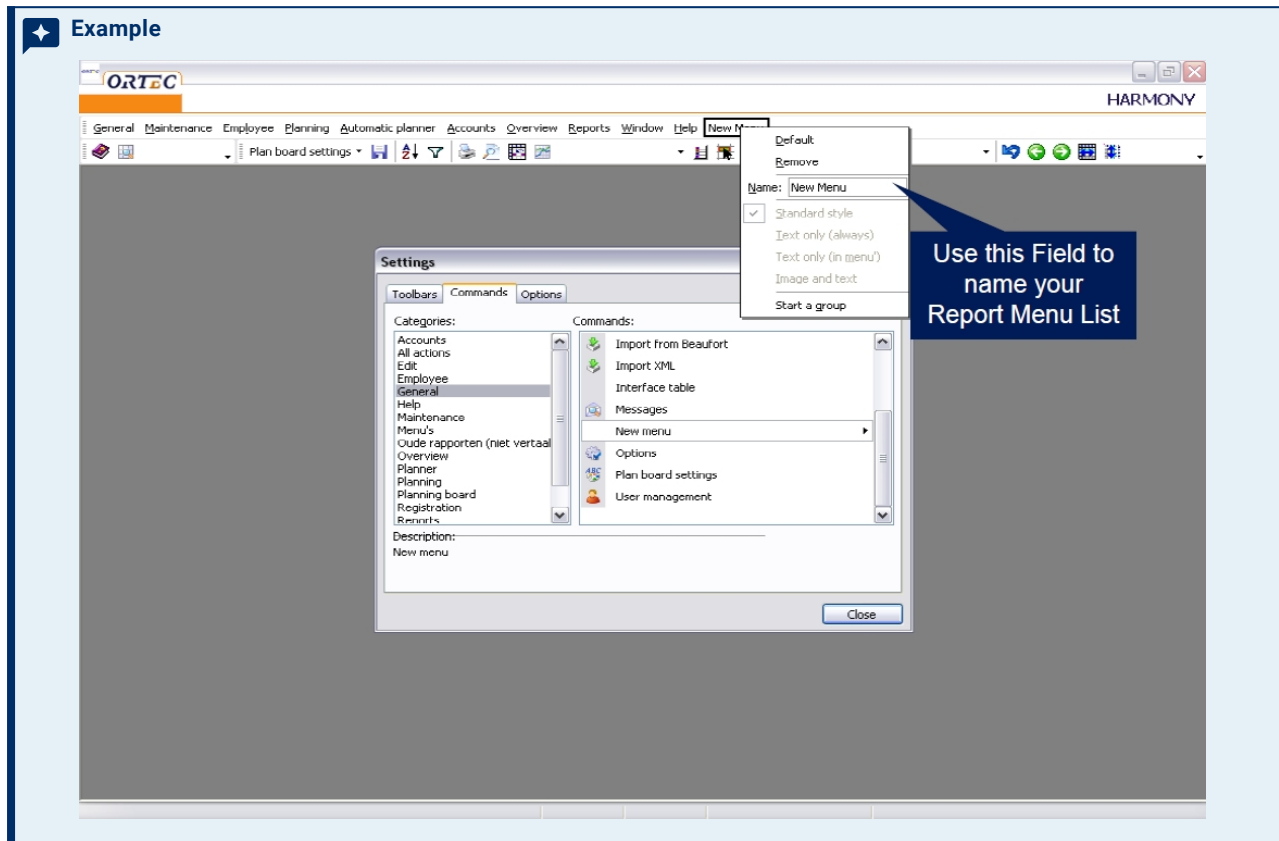
Follow the steps below to authorize the use of a report for a specific user group:

1. Open Access Control and activate the report authorization for the selected user group(s).
2. Open (or reopen) the ORTEC WS Client.
3. Click the button  to read the (adjusted) report definitions into ORTEC WS and to show these reports to all authorized users.

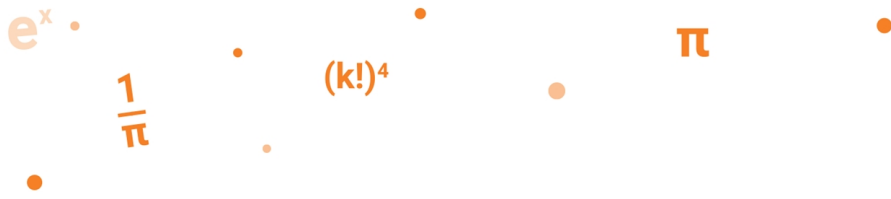
The report is now available for all authorized users. If the report is not visible yet, it needs to be added to a menu as described below.

4.2 Add reports to the menu bar

Before adding new reports to the menu toolbar, a new menu must be added to the default toolbar.



1. Right click the toolbar and select Customize.... A pop up window **Settings** appears.
2. Select the **Commands** tab and select Category **General** and Command **New menu**. Drag-and-drop the new menu to your toolbar.
3. Right click the new menu item on your toolbar (currently named 'New Menu') and change the menu name by entering the correct name in the field **Name**. Click **Enter** to confirm.
4. In the **Settings** window on the **Commands** tab, now select the category **Reports (Microsoft)**. The right side of the window now presents all reports that the user is authorized for and the menu options to refresh the report definitions and to show reports in multiple windows.
5. In the right side (**Commands** field) of the window, select report(s) and drag and drop them in your menu.
6. Optionally the name of the report(s) can be adjusted by right clicking the report(s).
7. In the **Settings** window, select **Close** and acknowledge your actions by selecting **Yes** on the window that appears next. In the next pop up window that appears, select **Yes** to make the new menu available to all other users, and **No** if it should only be available to the current user.

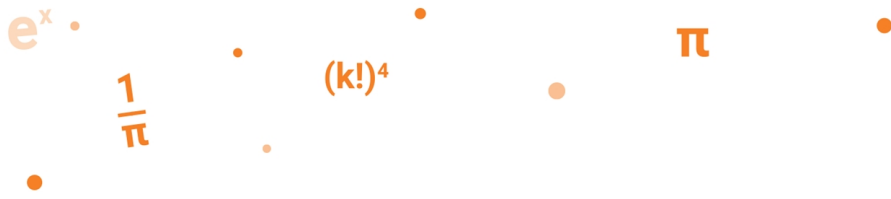


The selected report(s) are now available to use. Select a report from the menu bar to preview and/or print the report.

Activated reports can be removed from the **Reports** menu on the default toolbar as follows:

1. Right click the toolbar and select **Customize...** A pop up window **Settings** appears.
2. From the **Reports** menu on the default toolbar, drag the selected report and drop it in the **Settings** window.
3. In the **Settings** window, select **Close** and acknowledge your actions by selecting **Yes** on the window that appears next. In the next pop up window that appears, select **Yes** to make the new menu available to all other users, and **No** if it should only be available to the current user.

The selected report is now removed from the **Reports** menu.



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.