

ORTEC Workforce for Warehousing

User Manual Support Manager

augustus 2026 - Public

ORTEC

Copyright

© Copyright 2026 ORTEC.
All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of ORTEC or an ORTEC affiliate company.

ORTEC Workforce for Warehousing and other trademarks, trade names, service marks, logos and other distinctive signs of ORTEC B.V. displayed in this publication are protected by Dutch law and other applicable legislations. Any unauthorized use or reproduction is strictly prohibited.

All other product and service names mentioned are the trademarks of their respective companies.

Table of Contents

1 Support Manager 1

2 Inbound messages 2

2.1 Search messages 2

2.2 View and share message details 4

3 Outbound messages 5

3.1 Search messages 5

3.2 View and share message details 6

4 Manage sites 8

4.1 View sites 8

4.2 Add site 9

4.3 Edit site 9

5 View entity 20

6 Manage users 23

6.1 Search users 23

6.2 Add users 23

6.3 Manage users 23

1 Support Manager

The **Support Manager** application of the **ORTEC Workforce for Warehousing Suite** provides multiple support flows that can be used by a variety of users for a variety of reasons.

Example

- An application manager discovers an issue when checking the inbound messages.
- A configuration specialist adds warehouses and work areas to a site.
- A human resources employee manages user access to the **Task Scheduling** application.

© 2026, All rights reserved

2 Inbound messages

In the application, inbound messages can reveal issues when transferring information between authorized third-party applications and the **ORTEC Workforce for Warehousing Suite**. Inbound messages are received through a specific interface and can be searched and viewed in the **Support Manager** application. Share message and/or entity details via copy and paste.

> Example
>
> Employee information can be received from an HR-system application such as AFAS. Absence information can be received from an application such as Protime.
> This information is used by the optimizer in the **Task Scheduling** application to create optimal schedules.

2.1 Search messages

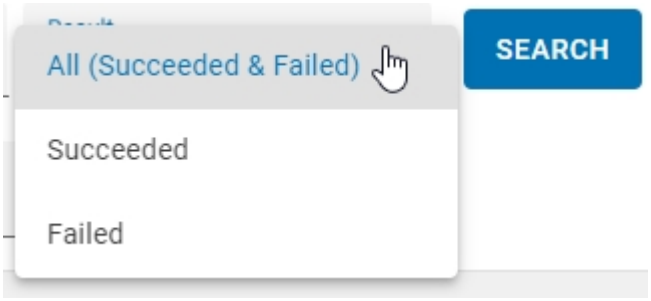
1. Go to the **Support Manager** application > **Inbound messages** tile.
2. Select the **Entity name** (required) of the entity that received the message.

   > An entity is any singular, identifiable, and separate object. It refers to individuals, organizations, systems, bits of data or even distinct system components that are considered significant in and of themselves.

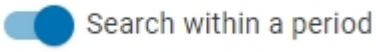
   > Example
   >
   > Area, Employee, Site, Skill, Task, User, and Warehouse are examples of entities in the **ORTEC Workforce for Warehousing Suite**.

3. Select the **Site** (required).
4. Define the **Entity id** (optional).
5. Define whether you want to view all results, only succeeded or only failed messages.

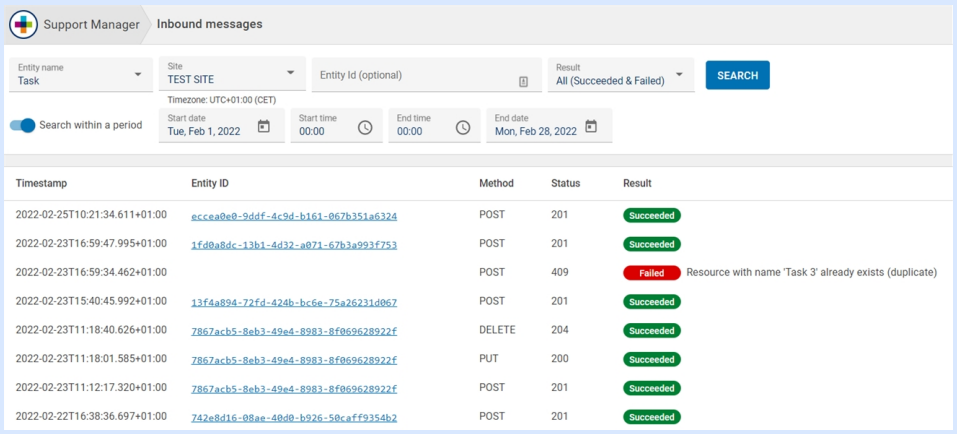
© 2026, All rights reserved



6. Click **SEARCH**.
   The most recent 100 messages (based on the **Timestamp**) are displayed.
7. Filter messages further based on a date and time range; Select the toggle **Search within a period**:



   - Define the **Start date**, **Start time**, **End time** and **End date**.
   - Click **SEARCH**.

> **Example**
>
> Result list inbound messages.
>
> 
>

8. Optionally, perform one or more of the following tasks:
   - **Sort the search results**
     Click a column header.
   - **View message details**
     Select a search result record.
   - **"View entity" on page 20**
     Select an **Entity ID** link.

© 2026, All rights reserved

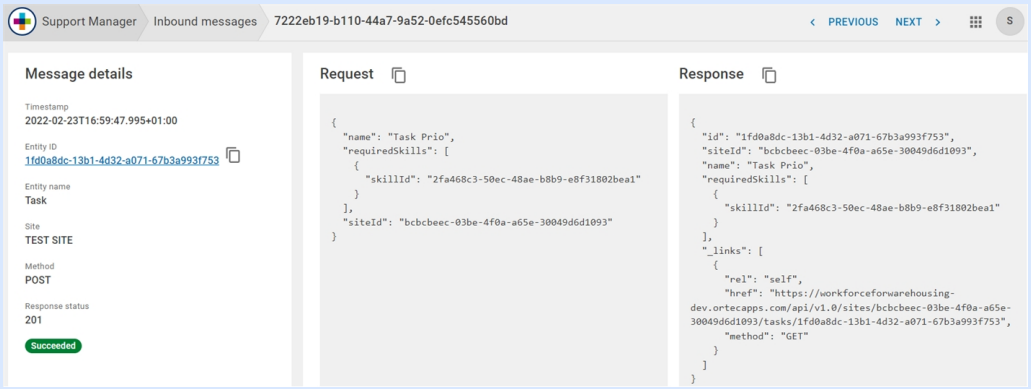
- **Copy Entity ID**

  Hover over any **entity ID** and click to copy the ID number.

2.2 View and share message details

1. From the Inbound messages result list, select a record.

> **Example**
>
> Message details vary with the method and status of the message. For example, the message of a PUT method consists of **Message details**, **Request**, and **Response**, while the message of a DELETE method shows only **Message details**.



2. Share message details:
   - Copy the **Request** and **Response** details if applicable.
   - Copy the **Entity ID** number.
3. Navigate to another message or page:
   - Click **PREVIOUS** or **NEXT** to browse through other messages in the search results.
   - Click **Inbound messages** to return to the previous page.

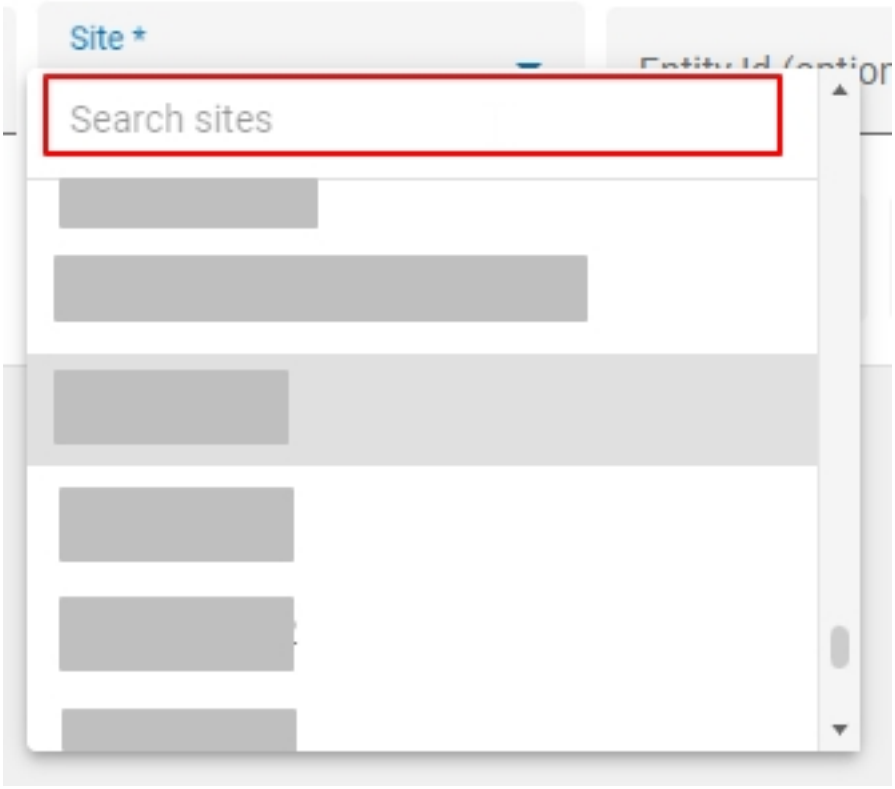
© 2026, All rights reserved

3 Outbound messages

In the application, outbound messages can reveal issues when transferring information between authorized third-party applications and the **ORTEC Workforce for Warehousing Suite**. Outbound messages are received through a specific interface and can be searched and viewed in the **Support Manager** application. Share message and/or entity details via copy and paste.

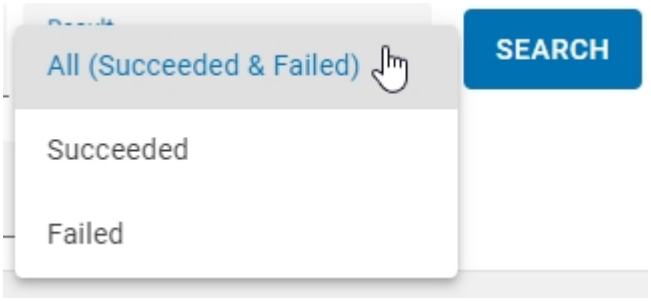
3.1 Search messages

1. Go to the **Support Manager** application > **Outbound messages** tile.
2. Select an **Event name** (required).
   - **SiteCreated**: Lists messages when a site was created.
   - **SiteDeleted**: Lists messages when a site was deleted.
3. Select a **Site** (required).
   Filter a long list with the **Search sites** option:

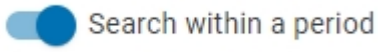


4. Define the **Entity id** (optional).
5. Define whether you want to view all results, only succeeded or only failed messages.

© 2026, All rights reserved



6. Click **SEARCH**.
   The most recent 100 messages (based on the **Timestamp**) are displayed.
7. To filter messages further based on a date and time range, select the **Search within a period** toggle:

   - Define the **Start time**, **End time**, **End date** and **End date**.
   - Click **SEARCH**.
8. Optionally, perform one or more of the following tasks:
   - **Sort the search results**
     Click a column header.
   - **View message details**
     Select a search result record.
   - **"View entity" on page 20**
     Select an **Entity ID** link.
   - **Copy Entity ID**

     Hover over any **entity ID** and click  to copy the ID number.

3.2 View and share message details

1. From the Outbound messages result list, select a record.

   > **Example**
   > Message details vary with the method and status of the message. For example, the message of a PUT method consists of **Message details**, **Request**, and **Response**, while the message of a DELETE method shows only **Message details**.

© 2026, All rights reserved

2. Share message details:
    - Copy the **Request** and **Response** details if applicable.
    - Copy the **Entity ID** number.
3. Navigate to another message or page:
    - Click **PREVIOUS** or **NEXT** to browse through other messages in the search results.
    - Click **Outbound messages** to return to the previous page.

© 2026, All rights reserved

4 Manage sites

In the **Support Manager** application, add new sites or update site information via the **Manage sites** tile.

A site is a group of warehouses situated close enough that distribution of employees within the site is physically possible. A warehouse is a physical building on a site. A warehouse consists of one or more areas. An area is a section within a warehouse used for planning a group of employees. For each area tasks are defined. To perform tasks within an area, skills are required.

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

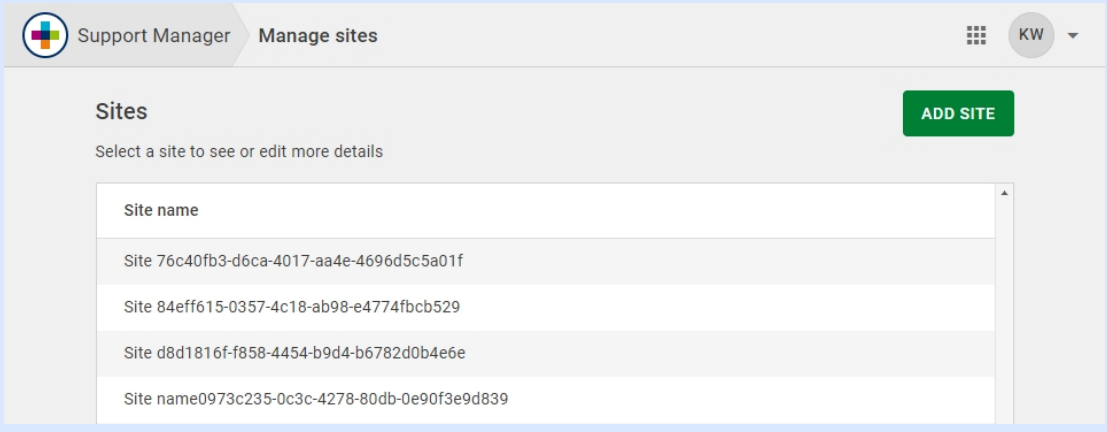
4.1 View sites

The **Manage sites** tab displays all existing sites.

It's not possible to delete sites yet.

Example

View sites.



© 2026, All rights reserved

4.2 Add site

1. Go to the **Support Manager** application > **Manage sites** tile > **ADD SITE** button.
2. Enter the **Site name** of the site.
3. Choose the site settings:
   - **Time zone**
   - **Week start**
     The current implementation allows only Monday.
4. (Optional) Define the **External info reference**.

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

5. (Optional) To enable economic unemployment for this site, activate **This site uses economic unemployment**.

> Economic unemployment means that you can send employees home in case of overstaffing. The employee still gets paid part of his salary. This setting can't be changed afterward.

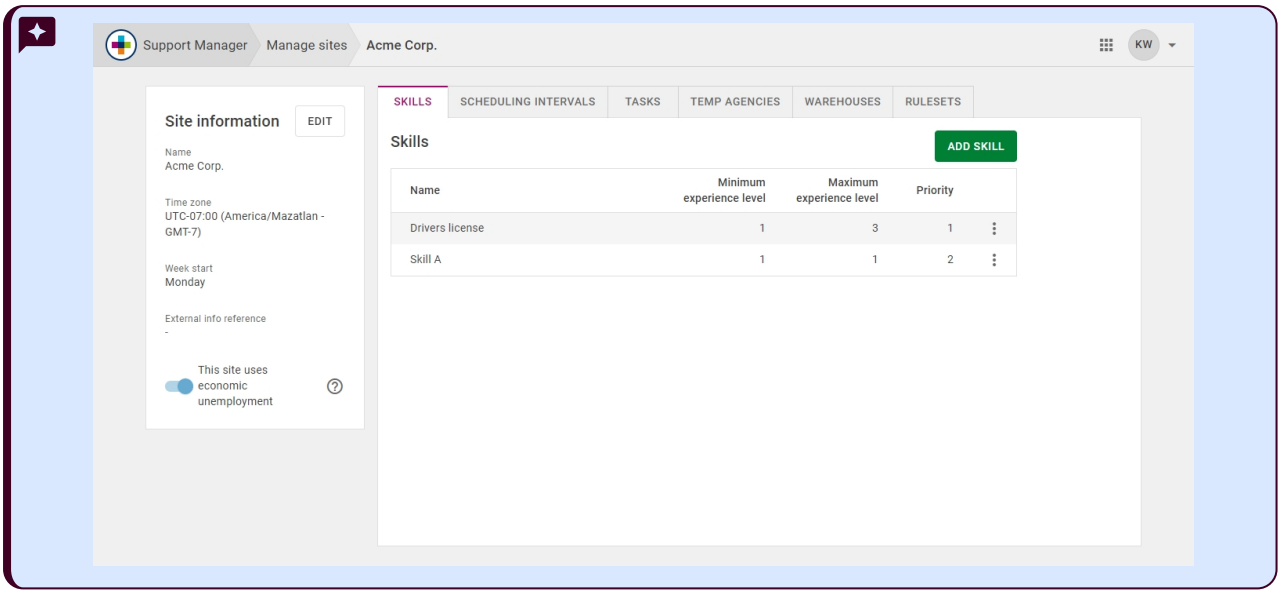
6. Click **ADD, AND SHOW SITE**.
7. (Recommended) Add "Skills" on page 10.

4.3 Edit site

1. On the **Manage sites** page, select the site of interest to display its details.
2. Edit the basic information of the site, as well as manage skills, scheduling intervals, tasks, temp agencies, warehouses, and rulesets of the site.

> Example
> Edit site.

© 2026, All rights reserved



4.3.1 Site information

Via the **Support Manager** application > **Manage sites** tile, you've selected or added a site.

1. In the **Site information** pane, click **EDIT**.
2. Change the **Name**, **Time zone**, **Week start** (in this implementation only Monday) and/or **External info reference**.

   - The **External info reference** should be equal to the site code used in the HR-system. This makes it possible to add employees via an interface to the correct site.
   - The economic unemployment setting can't be revoked.

3. Click **SAVE**.

4.3.2 Skills

Via the **Support Manager** application > **Manage sites** tile, you've selected or added a site.

© 2026, All rights reserved

Add skill

1. On the **SKILLS** tab, click **ADD SKILL**.
2. Enter the name, experience levels, and priority of the skill.
   - The minimum and maximum experience levels can be the same.
   - The priority of the skill is used by the optimizer to determine which skills should be planned first. A skill with priority 1 means it's the most important skill.
3. Click **ADD**.

Edit or delete skill

1. Find the skill of interest on the **SKILLS** tab.
2. Click the kebab menu (the three vertical dots menu) at the rightmost end of the entry.
3. Select **Edit skill** or **Delete skill** as needed.
   - In the **Edit skill** pop-up screen, change the name, experience levels and/or priority. Click **SAVE**.
   - In the **Delete skill?** pop-up screen, click **DELETE** to confirm.

4.3.3 Scheduling intervals

The scheduling intervals shown in **Task Scheduling** are non-overlapping intervals that define which shifts and workloads are scheduled together. The intervals are rolled out for the next couple of days.

Scheduling intervals are managed in the **Support Manager** application. Via the **Manage sites** tile, you've selected or added a site.

Manage scheduling intervals

1. On the **SCHEDULING INTERVALS** tab, click **EDIT SCHEDULING INTERVALS**.
2. To add a new scheduling interval, click the **ADD SCHEDULING INTERVAL** button.

   Scheduling intervals can't overlap and can't exceed 24 hours. If the end time is before the start time, the interval ends the next day.

   - Select the **Day of the week** on which the new scheduling interval must start.
   - Enter an **Interval name**.
   - Define the **Start time** and **End time**.
   - Click **ADD**.

© 2026, All rights reserved

3. To edit a scheduling interval, select - in the appropriate row - the **Edit** icon.
   - Adjust the **Day of the week**, **Interval name**, **Start time** and/or **End time**.
   - Click **UPDATE**.
4. To delete a scheduling interval, select - in the appropriate row - the **Delete** icon.

> The scheduling interval is deleted immediately. However, if you made a mistake, click the **CANCEL** button and click **DISCARD**.

4.3.4 Tasks

> Via the **Support Manager** application > **Manage sites** tile, you've selected or added a site.

Add task

1. Select the **TASKS** tab.
2. Click **ADD PRODUCTIVE TASK** or **ADD NONPRODUCTIVE TASK**.
3. Enter the **Name** of the task.
4. (Optional) Enter the **External info** reference.
5. (Optional, only for productive tasks) Define the **Fill rate (percentage)**.

> The fill rate is the minimal duration of a productive task assigned to a shift, relative to the workload's duration. A violation occurs if the fill rate is not met.

6. (Optional, only for productive tasks) Add one or more skills required for the task.

> Make sure "Skills" on page 10 have been added first.

7. Click **ADD**.

Edit or delete task

1. Find the task of interest on the **TASKS** tab.
2. Click the kebab menu (the three vertical dots menu) at the rightmost end of the entry.
3. Select **Edit (non)productive task** or **Delete (non)productive task** as needed.
   - In the **Edit (non)productive task** pop-up screen, change the name and/or skills. Click **SAVE**.
   - In the **Delete (non)productive task** pop-up screen, click **DELETE** to confirm.

© 2026, All rights reserved

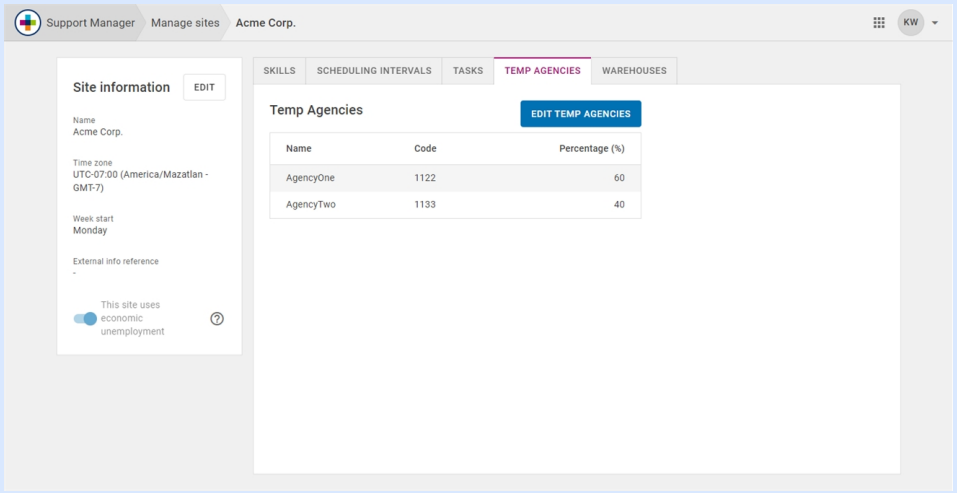
4.3.5 Temp agencies

Via the **Support Manager** application > **Manage sites** tile, you've selected or added a site.

Add temp agency

1. Select the **TEMP AGENCIES** tab.
   - To add the first temp agency, click **ADD TEMP AGENCY**. In the **Add temp agencies** window, define the **Temp agency name**, **Code**, and **Percentage**. Click **+ ADD TEMP AGENCY** to add another one immediately.
   - To add more temp agencies, click **EDIT TEMP AGENCIES**.

   Example
   Edit or add temp agencies.



   a. In the **Edit temp agencies** window, select the **+ ADD TEMP AGENCY** button.
   b. In the added row, define the **Temp agency name**, **Code**, and **Percentage**.

   - The code can be used to integrate the employees to each temp agency. It should match the temp agency code used when importing an employee.
   - The percentage indicates the portion of each temp proposal allocated to it. The total amount of percentages should be 100%. It can't be less or more.

2. Click **SAVE AND PROCESS**.

© 2026, All rights reserved

Edit or delete temp agencies

1. Select the **TEMP AGENCIES** tab.
2. Click **EDIT TEMP AGENCIES**.
   - To edit, change the settings and click **SAVE AND PROCESS**.
   - To delete, select the icon. To confirm, click **DELETE**.

4.3.6 Warehouses

Warehouses are defined on the site level. Add areas within a warehouse.

Add warehouse

Via the **Support Manager** application > **Manage sites** tile, you've selected or added a site.

1. Select the **WAREHOUSES** tab.
2. Click **ADD WAREHOUSE**.
3. Enter the name of the warehouse.
4. Click **ADD, AND SHOW WAREHOUSE**.
5. (Recommended) Add "Work areas" on page 15.

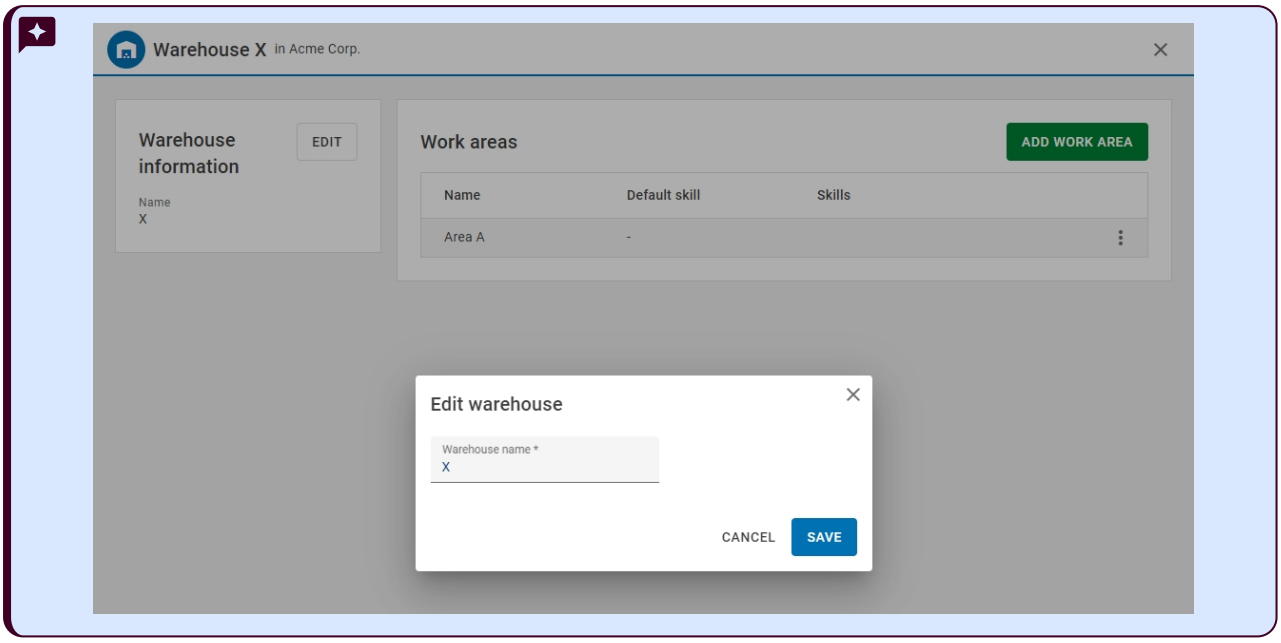
Edit warehouse

Via the **Support Manager** application > **Manage sites** tile, you've selected a site.

1. Find the warehouse of interest on the **WAREHOUSES** tab.
2. Click the entry of the warehouse to open the Warehouse window or click the kebab menu (the three vertical dots menu) at the rightmost end of the entry, and select **View warehouse**.
3. In the **Warehouse information** pane, click **EDIT**.
4. It's only allowed to change the **Warehouse name**.
5. Click **SAVE**.
6. (Recommended) Add "Work areas" on page 15.

Example
Edit warehouse.

© 2026, All rights reserved



Work areas

Add work area

Via the **Support Manager** application > **Manage sites** tile, you've selected or added a site. Next, you added or selected a warehouse.

1. Click **ADD WORK AREA**.
2. Enter the name of the work area.
3. (Optional) To add skills to the work area, click **ADD DEFAULT SKILL** or **ADD SKILL** and select a skill from the drop-down list.

   Make sure "Skills" on page 10 have been added first.

   A default skill is automatically assigned to an employee if they receive a team assignment. All other skills need to be added manually in the **Employee Management** application.

4. Click **ADD**.

Edit or delete a work area

1. Find the work area of interest in the **Work areas** pane.
2. Click the kebab menu (the three vertical dots menu) at the rightmost end of the entry.

© 2026, All rights reserved

3. Select **Edit work area** or **Delete work area** as needed.
    - In the **Edit work area** pop-up screen, change the name and/or (default) skills. Click **SAVE**.
    - In the **Delete work area?** pop-up screen, click **DELETE** to confirm.

Delete warehouse

> Via the **Support Manager** application > **Manage sites** tile, you've selected a site.

1. Find the warehouse of interest in the **WAREHOUSES** tab.
2. Click the kebab menu (the three vertical dots menu) at the rightmost end of the entry.
3. Select **Delete warehouse**.
4. To confirm, click **DELETE**.
   The warehouse is deleted.

4.3.7 Rulesets

Rulesets influence the behavior of the optimizers in Task Scheduling. A ruleset consists of one or more rules that define how shifts should be scheduled or planned.

> Via the **Support Manager** application > **Manage sites** tile, you've selected or added a site.

Add ruleset

1. Select the **RULESETS** tab.
2. Click **ADD RULESET**.
3. Enter the name of the ruleset.
4. (Optional) Add a description for the ruleset.
5. Click **SAVE, AND SHOW RULESET**.

Manage ruleset

> You've added a new ruleset or selected an existing one on the **RULESETS** tab.

1. To edit the name and/or description, select **EDIT** in the **Ruleset** section.
2. To edit the general rules, select **EDIT** in the **General rules** section.
    - Define whether all tasks assigned to the same shift should be worked in the same work area or not.

© 2026, All rights reserved

3. To delete a ruleset, select **DELETE RULESET**.
4. To add rules, select **ADD RULE**.
    - Select one of the default rule types from the dropdown list.
    - Select **CONTINUE**.
    - Fill out the rule details. For more information, see "Rule types" on page 17.
    - Select **SAVE**.
    - To add more rules, select **ADD RULE** again.

Rule types

Each rule is based on a rule type, as outlined in this topic. Some rules can be categorized as hard rules, which remove specific assignments, or soft rules, which impose costs for assignments. The higher the cost compared to another rule, the lower the change of the rule being executed. A rule can apply to all or one or more specific weekdays or scheduling intervals. Users can view a concise summary of each rule being added or edited for easy reference.

Assign task max once in shift

Select the tasks that can only be assigned once in a single shift.

1. Define the **Name** and **Description** of the rule.
2. Select one or more **Tasks**.

    Even though multiple tasks can be selected, only one of these tasks will be assigned in a single shift.

3. (Optional) Select specific days or scheduling intervals for this rule to be applied. First, select the slide button. Next, define those days and scheduling intervals.
4. Click **SAVE**.

Maximum number of tasks allowed

1. Define the **Name** and **Description** of the rule.
2. Assign a **Cost** to the rule.
3. Define the maximum number of tasks that are allowed to be assigned.
4. (Optional) Select specific days or scheduling intervals for this rule to be applied. First, select the slide button. Next, define those days and scheduling intervals.
5. Click **SAVE**.

© 2026, All rights reserved

Minimum task duration

1. Define the **Name** and **Description** of the rule.
2. (Optional) Assign a **Cost** to the rule. First, select the slide button. Next, define the cost.
3. Define the minimum task duration.
4. (Optional) Select specific days or scheduling intervals for this rule to be applied. First, select the slide button. Next, define those days and scheduling intervals.
5. Click **SAVE**.

Tasks not allowed to be combined

Select the tasks that are not allowed to be combined with each other in a single shift.

1. Define the **Name** and **Description** of the rule.
2. (Optional) Assign a **Cost** to the rule. First, select the slide button; then, define the cost.
3. Select two **Tasks** that are not allowed to be combined.
4. (Optional) Select specific days or scheduling intervals for this rule to be applied. First, select the slide button. Next, define those days and scheduling intervals.
5. Click **SAVE**.

Only same tasks can be assigned

Select the tasks that can only be assigned with identical tasks in a single shift.

1. Define the **Name** and **Description** of the rule.
2. (Optional) Assign a **Cost** to the rule. First, select the slide button; then, define the cost.
3. Select one or more **Tasks**.

   Even though multiple tasks can be selected, only one of these tasks will be assigned and combined in a single shift.

4. (Optional) Select specific days or scheduling intervals for this rule to be applied. First, select the slide button. Next, define those days and scheduling intervals.
5. Click **SAVE**.

Assigned tasks must be different

As all tasks within a single shift should be different from each other, there's no need to select specific tasks.

© 2026, All rights reserved

1. Define the **Name** and **Description** of the rule.
2. Assign a **Cost** to the rule.
3. (Optional) Select specific days or scheduling intervals for this rule to be applied. First, select the slide button. Next, define those days and scheduling intervals.
4. Click **SAVE**.

Assign only a specific task to a shift

1. Define the **Name** and **Description** of the task.
2. Assign a **Cost** to the rule.
3. Select a **Task**.
4. (Optional) Select specific days or scheduling intervals for this rule to be applied. First, select the slide button. Next, define those days and scheduling intervals.
5. Click **SAVE**.

© 2026, All rights reserved

5 View entity

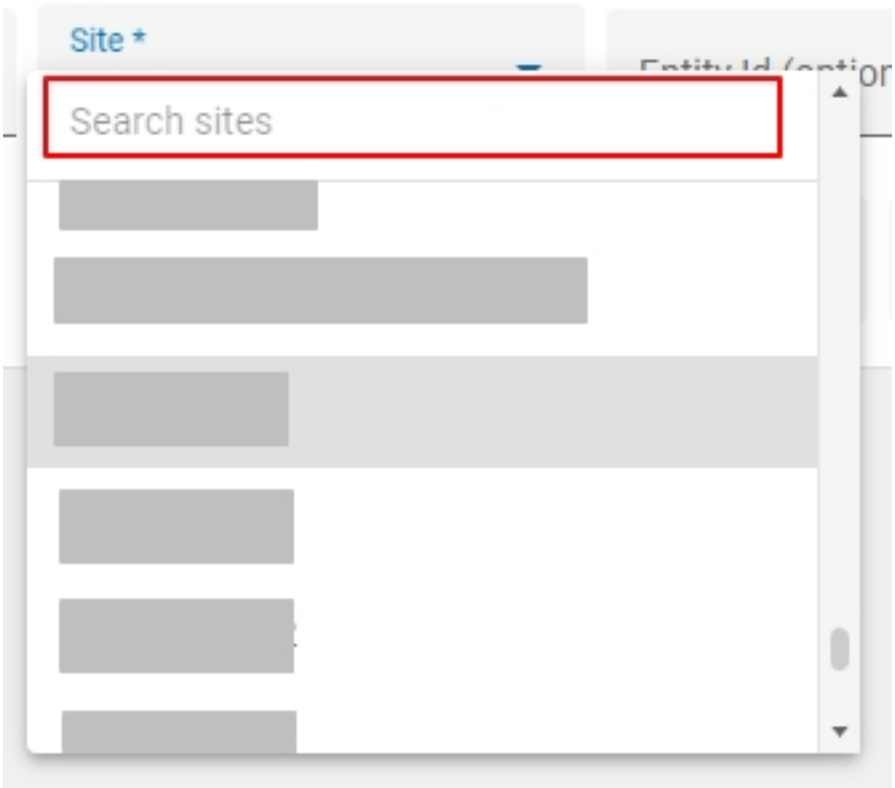
In the application, you can - as an application manager - make informed decisions on how to proceed when issues arise. View and share detailed information of an entity.

An entity is any singular, identifiable, and separate object. It refers to individuals, organizations, systems, bits of data or even distinct system components that are considered significant in and of themselves.

1. Go to the **Support Manager** application > **View Entity** tile.
2. Search for an entity. All fields are required.

   Or, search for "Inbound messages" on page 2 or "Outbound messages" on page 5 and select an Entity ID link to view the entity.

   - Select an **Entity type**.
   - Select a **Site**.
     Filter a long list with the **Search sites** option:



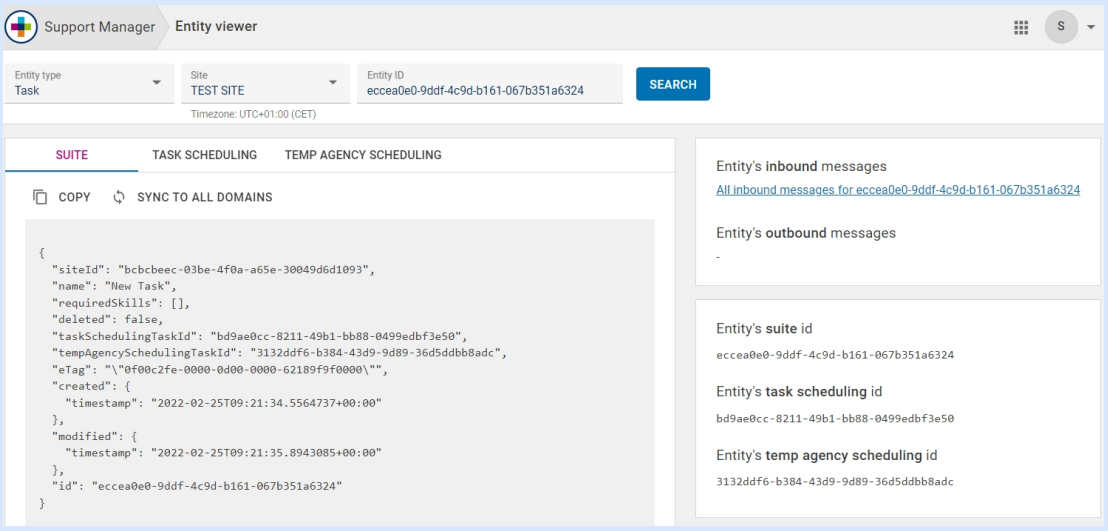
© 2026, All rights reserved

- Define or paste the **Entity ID** (copied from **Inbound messages** or **Outbound messages**).
- Click **SEARCH**.
  The information displayed varies with the entity type.

> **Example**
>
> A Task entity presents details in **SUITE**, **TASK SCHEDULING**, and **TEMP AGENCY SCHEDULING** tabs whereas an Area entity presents two more tabs, **EMPLOYEE MANAGEMENT** and **SHIFT SCHEDULING**.

3. For each entity, you can:
   - View and copy the details displayed in various tabs.
   - Trigger applicable data synchronization using the option **SYNC TO ALL DOMAINS**. This isn't applicable to entities such as Site.
   - Access the entity's "Inbound messages" on page 2 and/or "Outbound messages" on page 5.
   - Copy the various entity ids.

> **Example**
>
> Below is an example of a task entity.



© 2026, All rights reserved

6 Manage users

In the application, search, add or manage users of the **ORTEC Workforce for Warehousing Suite** via the **Manage users** tile.

6.1 Search users

1. Filter on **User type** and/or **Site**.

   > You might not be authorized to filter on **User type**.
   >
   > To view all users again, click **RESET FILTERS**.

2. Enter the **External id** or **name**.

   > Use the email address to find a specific user or use the department name to find all users belonging to that department.

3. Push **Enter**.

6.2 Add users

1. Click **ADD USER**.
2. (Optional) Select a **User type**.
3. Enter an **External id**.

   > Use the email address of a user.

4. (Optional) Enter a **Name**.
5. Click **ADD, AND SHOW USER**.

6.3 Manage users

1. Click on a user.
2. To copy the **External ID**, click - in the **User information** section - **EDIT**.
   - Click the **Copy** icon. The **External ID** is copied.
   - To close the **Edit user** window, click **CANCEL** or **SAVE**.

© 2026, All rights reserved

3. To edit the **Name** of the user, click - in the **User information** section - **EDIT**.
   - Change the name.
   - Click **SAVE**.
4. To delete the user, select **DELETE USER**.
5. To view the **User role information**, click - in the **User roles** section - the link **What type of user roles are there?**
   - View all user role information.

> In the table below you can view - per application -the available roles, the scope of each role and the permissions associated with each role. The scope determines per role where access is granted. This can be limited to a specific site, team or temp agency within a site. Roles can be combined to provide access for multiple sites/teams/temp agencies.
>
> On top of these roles, each roll can be defined for either all, ORTEC or a specific customer, which determines who is allowed to add users. ORTEC users are only allowed to manage ORTEC users, customer users are only allowed to manage customer users. Additionally, customers aren't allowed to set up the Reader role as this role is reserved for ORTEC Global Support for customer production environments.
>
> **Table**

© 2026, All rights reserved

Application	Role	Scope	Permissions
All	Owner	-	Do anything (including access control)
	Site contributor	Site(s)	Do anything with data in sites of scope (siteIds)
	Reader	-	Read anything
Employee Management	Human Resources Contributor	Site(s)	Manage template working patterns Manage teams of sites in scope (siteIds) Manage employees of sites in scope (siteIds)
	Employee Skill Manager	Site(s), Team(s)	Manage availableSkills of employees in teams in scope (siteIds, teamIds)
Support Manager	Support Employee	-	Use entity viewer Read inbound/outbound messages Create sync requests
	User Manager	User type(s)	Manage users of type in scope (userTypes) Grant UserManager role with userType scope to other users
	Application Manager	-	Can manage sites, warehouses, areas, skills, tasks
Task Scheduling	Scheduler	Site(s)	Manage shifts and shift task Schedules of sites in scope (both TS and SS API's, siteIds)
Temp Agency Scheduling	Temp Agency Scheduler	Site(s), Temp Agencie(s)	Read requests and manage contracts (siteIds, tempAgencies)
Suite landing page	Reporter Reader?	Site(s)	Read reports for sites in scope (siteIds)
API	API can receive all roles	-	Do anything (only used for Suite syncing) System users are created by the system now (from code) and cannot be manipulated through the API there is actually only 1 such user: the suite user that is used to sync data

- Click the cross to go back.

6. To assign or edit user roles, click - in the **User roles** section - **EDIT**.
   - To delete a role, click the **Delete** icon.
   - To change a role, select another role from the **Role** drop-down list. For some roles the scope needs to be defined. See the example in the next step.
   - To assign a role for access to an application, the Suite overview or the API, select - in the appropriate section - **+ ADD ROLE**. For some roles the scope needs to be defined.

Example

For the **Employee Skill Manager** role, also define the **Site(s)** and **Team(s)** for which access is granted.

© 2026, All rights reserved

- Click **SAVE**.

© 2026, All rights reserved

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.