

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

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

ORTEC Workforce Scheduling 7

# Implementation Manual

## Team Scheduler



December 2025

$e^x$

$\frac{1}{\pi}$

$(k!)^4$

$\pi$

© Copyright 2025 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 Scheduling 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	Introduction	1
2	Permissions	2
2.1	Other permissions	2
3	Configurable columns employee calculations	4
4	Configurable column employee proposal	7
5	Configurable counts	9
6	Special leave treatments	10
7	Sick leave properties	11
8	Number of schedules on dashboard	12
9	Reports	13



# 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.

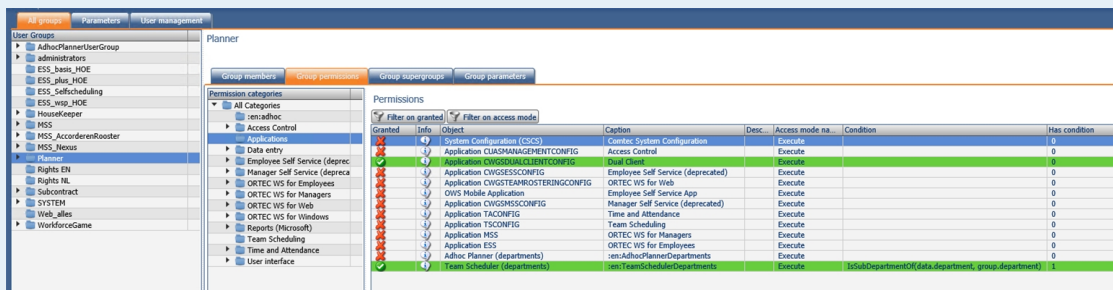
# 2 Permissions

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

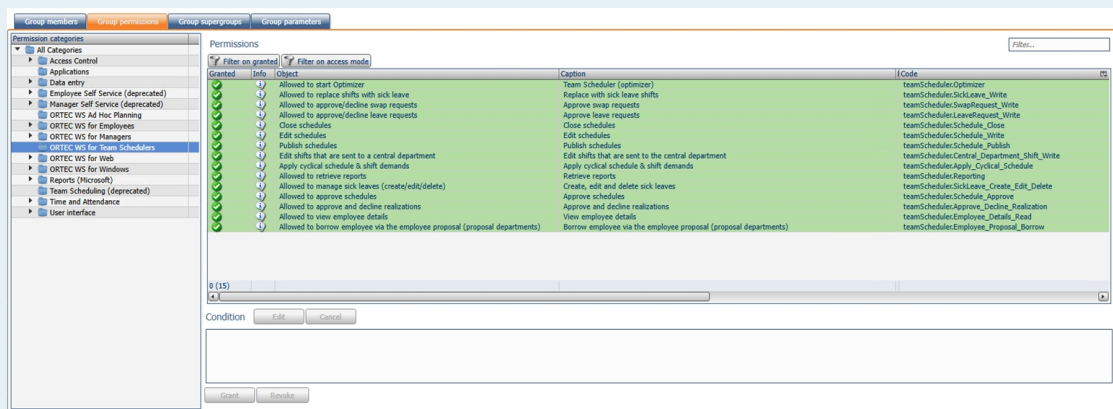
In this screenshot, the user group Planner has been granted the permission Team Scheduler (departments).



## 2.1 Other permissions

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

## Example



- 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.

$e^x$  $\frac{1}{\pi}$  $(k!)^4$  $\pi$ 

- **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.

# 3 Configurable columns employee calculations

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

## Example

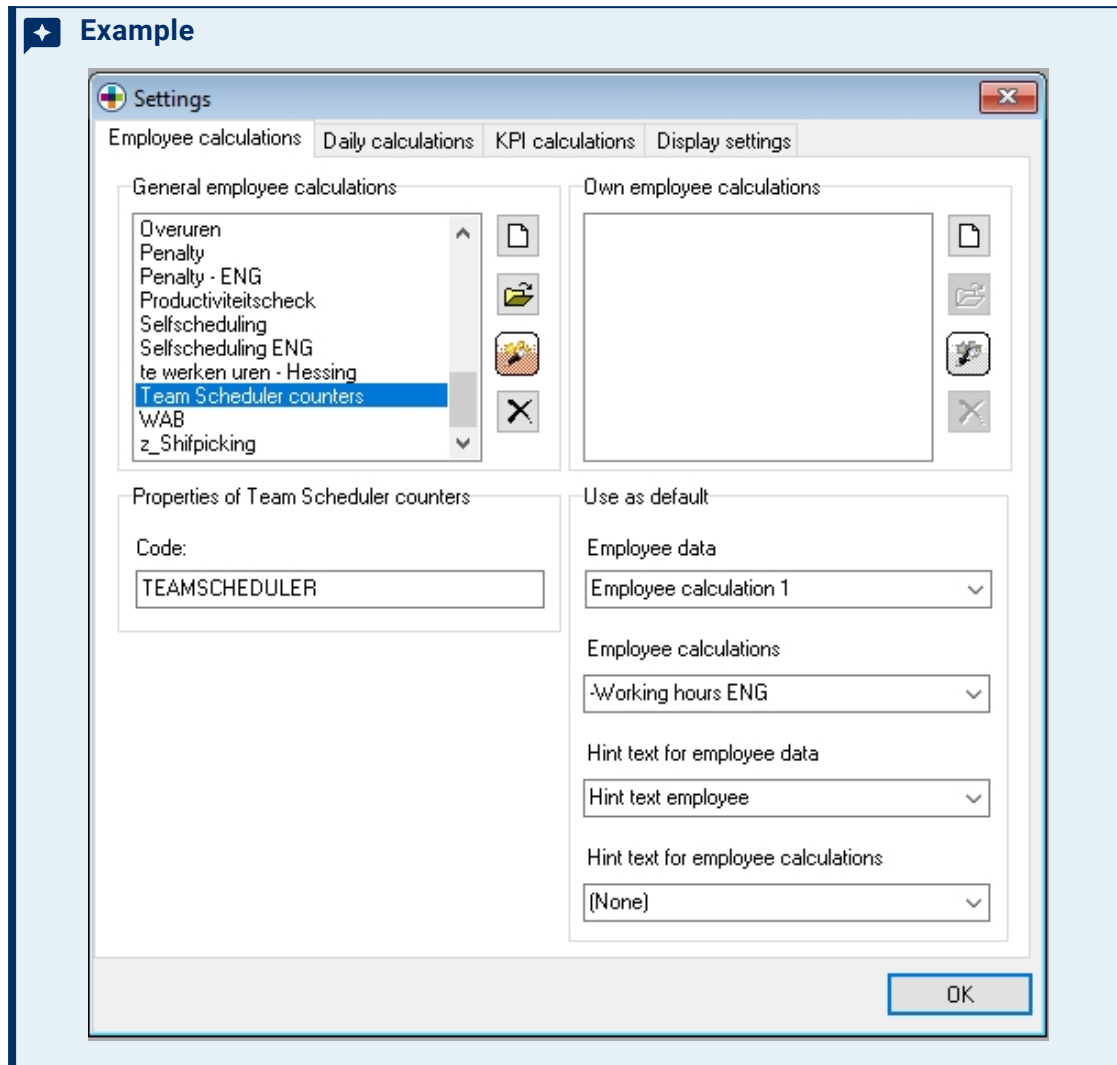
The Contract hours column is fixed, while the columns to its right are configurable.

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.

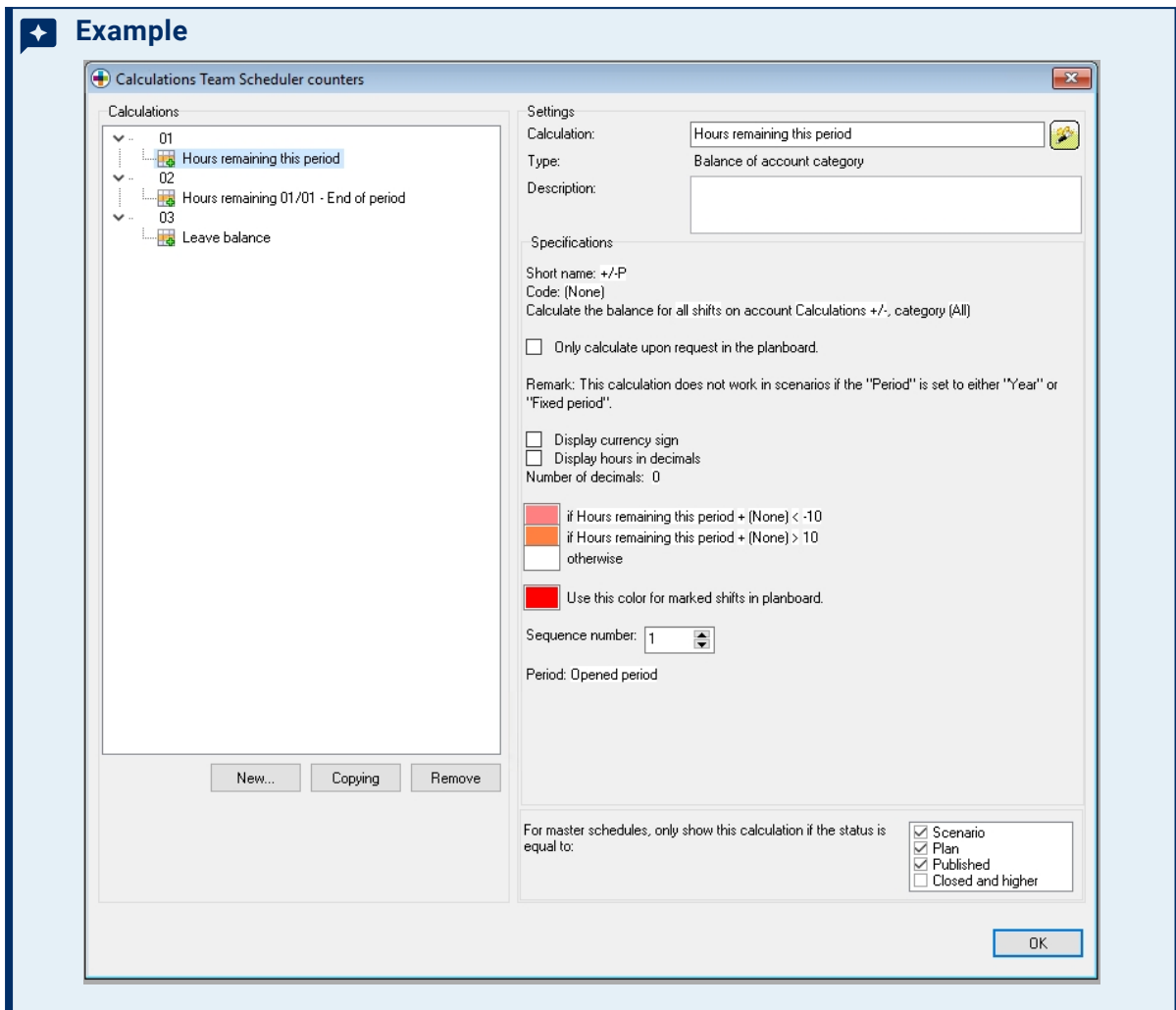
1. In the **ORTEC WS Client**, go to **General > Plan board settings**.
2. In the **Employee calculations** tab, check if there's an Employee calculation with code **TEAMSCHEDULER**.

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




- b. If such an entry doesn't exist, create a new Employee calculation with code TEAMSCHEDULER. For details, see ORTEC Workforce Scheduling User Manual.


3. Select the Employee calculation and click open  .



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.

- 
- 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.

# 4 Configurable column employee proposal

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

**Example**

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

The screenshot shows a web interface for 'Employee proposal' for 'C' on March 8. It features a 'Shift details' sidebar and a main 'Available employees' table. The table has columns: Name, Phone number, Skills, Violations, Hour balance, Shift wish, Preference (availability), and Planned shifts. The 'Hour balance' column is highlighted as the 'Urensaldo' column.

Name	Phone number	Skills	Violations	Hour balance	Shift wish	Preference (availability)	Planned shifts
<input type="radio"/> TestCasper, K.		✓		-143			
<input type="radio"/> Riese, Jed	06-2879374	✓		-133			
<input type="radio"/> Baltes, Michelinas	06-113597	✓		-69	B		
<input type="radio"/> Nijdam, Lodewijk	06-3390707	✓		119			
<input type="radio"/> Broere, Mels van	06-3390722	✓	⊕	-84			
<input type="radio"/> Garrison, Hans	06-113589	✓	⊕	-13			
<input type="radio"/> Turner, Joyce	06-113587	✓	⊕	9			A (07:00 AM - 03:00 PM)
<input type="radio"/> Lammers, Kaya	06-3390772	✓	⊕	-2			
<input type="radio"/> Hartog, Cornelis	06-3347798	✓	⊕	-2			A (07:00 AM - 03:00 PM)
<input type="radio"/> Timmermans, Freek	06-3568453	✓	⊕	-12			B (03:00 PM - 11:00 PM)

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.

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

$$\sum_{n=0}^8 \frac{x^n}{n!}$$

→P

The screenshot shows the 'Settings Manager' application. On the left is a navigation tree with categories like 'Monitoring', 'Configuration', and 'System Monitor'. The 'Settings Manager' category is expanded, showing a list of settings. The main area displays a table of settings for the selected path: 'TeamScheduling > EmployeeProposals > Leave > WorkForce.Backend'.

Setting Name	Running	Default	Store...	Description	Path	Comment
AccountCategoryName (TeamScheduling\EmployeePropo...	saldo			Account category name for the account bal...	TeamScheduling\EmployeeProposaR	
AccountName (TeamScheduling\EmployeeProposaR)	Calculations +/-			Running account name for the account bal...	TeamScheduling\EmployeeProposaR	
HeaderOfAccountBalance (TeamScheduling\Employee...	Utensaldo	Balance		Header of the account balance column.	TeamScheduling\EmployeeProposaR	
SortingOrder (TeamScheduling\EmployeeProposaR)	Ascending	Descending		Sorting order of the account balance column.	TeamScheduling\EmployeeProposaR	

$e^x$

$\frac{1}{\pi}$

$(k!)^4$

$\pi$

# 5 Configurable counts

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**. For details on daily calculations, see **ORTEC Workforce Scheduling User Manual**.



- 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.

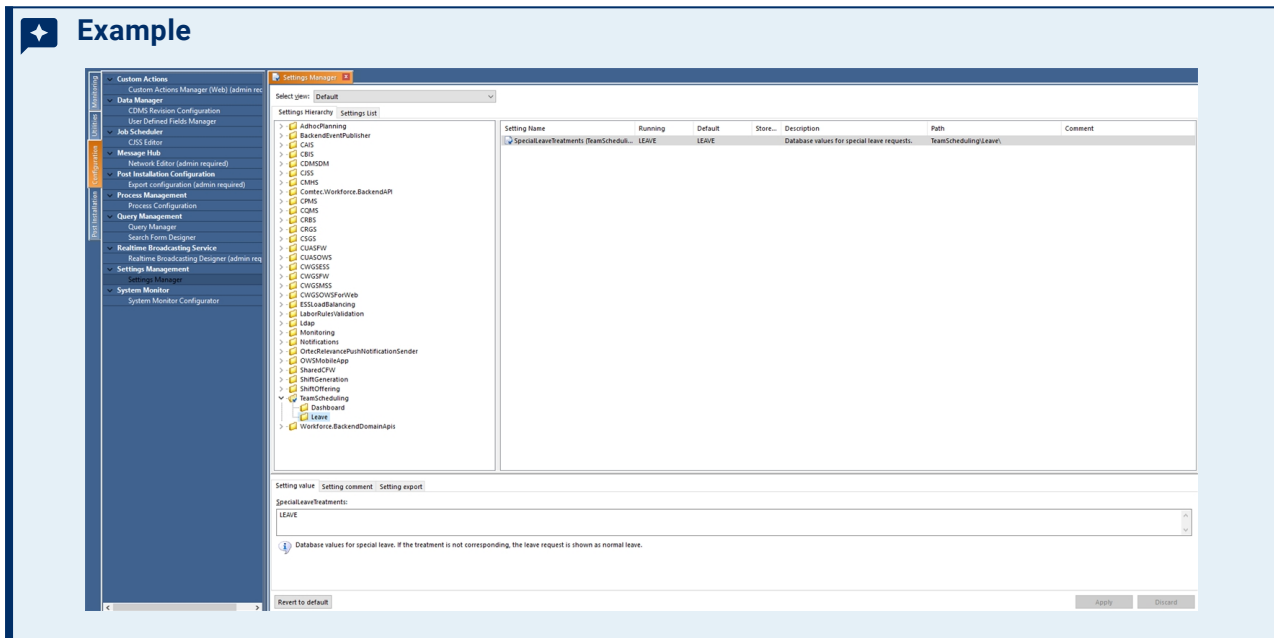
	VACANT SHIFTS	STAFFING	COUNTS	Sun 2/4	Mon 2/5	Tue 2/6	Wed 2/7	Thu 2/8	Fri 2/9	Sat 2/10	Sun 2/11
Budget			176978	8138	5137	5280	5280	5280	5445	8365	8138
Costs			158108	7689	4816	4678	4358	4246	5517	7048	8194
Result		€	18870	448	321	602	922	1034	-72	1317	-56
Shifts Total			897	31	33	33	30	30	33	29	31
Day 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

# 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**.



# 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**

Setting Name	Running	Default	Store...	Description	Path	Comment
Properties (TeamScheduling/SickLea... Continued ill...	Running			Sick leave properties used in ORTEC WS for ...	TeamScheduling/SickLeave	

Setting value    Setting comment    Setting export

Properties:  
Continued illness,Manager approved

With this setting, it is possible to configure which yes/no sick leave properties are visible and editable in ORTEC WS for Team Schedulers. This is a comma separated list with property names and it is important to not include spaces before or after the commas.

Revert to default    Apply    Discard

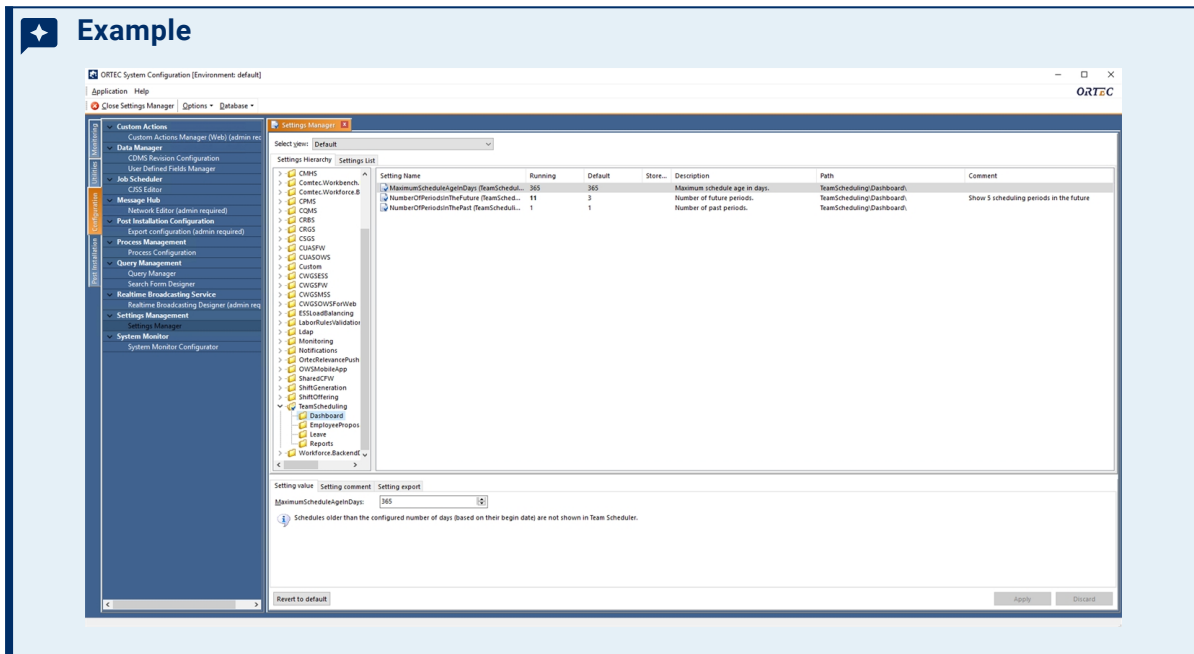
# 8 Number of schedules on dashboard

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**.



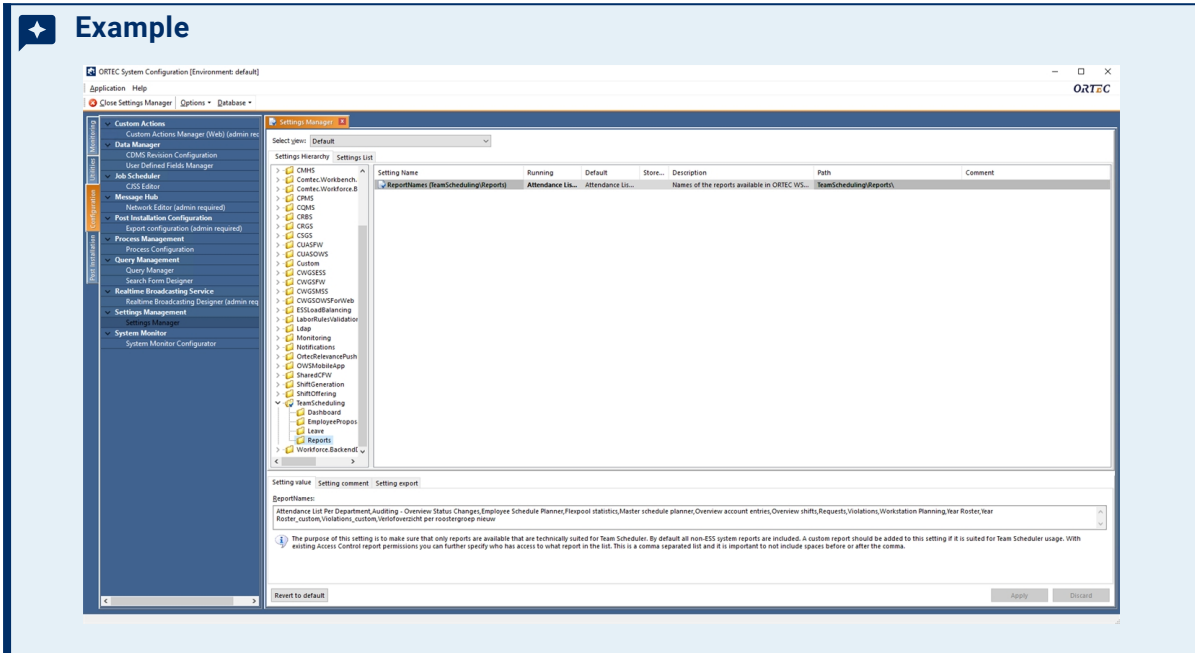
3. To configure the displayed number of schedules in the future, update the setting **NumberOfPeriodsInTheFuture**.
4. To configure the displayed number of schedules in the past, update the setting **NumberOfPeriodsInThePast**.
5. Refresh the dashboard page to see the changes.

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

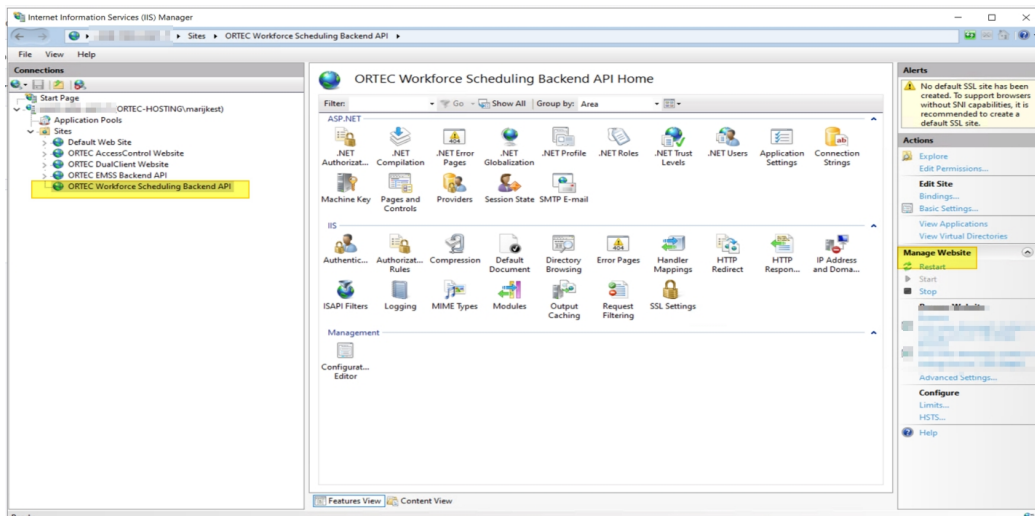
 In addition, the setting called **TeamScheduling\Dashboard\MaximumScheduleAgeInDays** makes sure that schedules older than the configured number of days will no longer be shown in Team Scheduler. The default value is 365 days. This setting also makes sure that the nightly refresh of calculations will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

# 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.

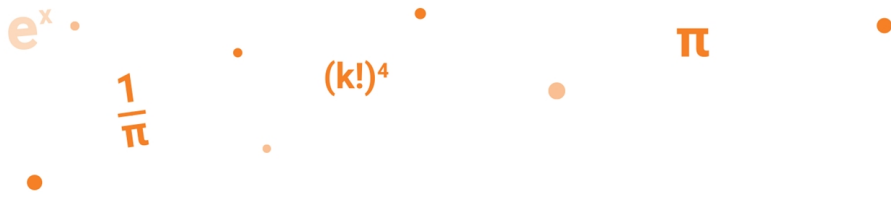


- Restart the **ORTEC Workforce Scheduling Backend API** to make the added custom report(s) visible.



- 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](#).



## 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](http://www.ortec.com)

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