

ORTEC Workforce Scheduling 7

Implementation Manual Manager Self-service

August 2026 - Public

ORTEC

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1 Overview

ORTEC Workforce Scheduling for Managers or **Manager Self-Service (MSS)** app is a web application that allows managers to view and manage their team's schedule online. It's designed for managers who supervise a small number of teams, up to a maximum of 250 employees distributed over a maximum of 50 departments. The web application provides the following functionality:

- View team schedule online
- Monitor under- and overstaffing in departments
- Approve or decline leave requests
- Check employee sickness
- Approve or decline employee actuals
- Approve schedules
- Check labor rule violations
- Add or remove reports or insights based on accounts

1.1 Comparisons with other ORTEC apps

- **ORTEC Workforce Scheduling** is a comprehensive scheduling tool with extensive features and configurability.
- **ORTEC WS for Team Schedulers** is used by schedulers to manage shifts.
- **ESS** is used by employees to view their schedule, request leave, indicate availability, swap shifts, and more.
- **Ad Hoc Planning** is designed to solve on-the-fly scheduling issues around the execution day and is optimized for quick use on tablets. It focuses on immediate problem-solving.

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2 Configuration

ORTEC System Configuration

The following settings in ORTEC System Configuration are relevant to configure the functionality of ORTEC Workforce Scheduling for Managers:

> The relevant settings in ORTEC System Configuration can be found in the tab **Configuration** | **Settings Management** | **Settings Manager** folder **Comtec.Workforce.BackendAPI** folder **Portals**

Schedule: show shifts in the special shift section

In the schedule, it is possible to show shifts in a special shift section.

- Folder: **Portals**, Setting: **NoWorkTreatments**
  Database values for no work treatments to be used for the special shift section in the schedule of MSS. If a shift contains one or more of these treatments, it is displayed in the special shift section. Otherwise, it is shown in the shift section.

  Default value = 'CONSIGNAT', 'ILLNESS', 'ILLNESSNL', 'ILLNESSNW', 'PIKET', 'PAUSE', 'DAYOFF', 'SATDAYOFF', 'SUNDAYOFF', 'COMPDAYOFF', 'VACATIONNW', 'COMPLEAVE', 'LEAVE','VACATION'

  > Treatments are visible in the database. Run query 'select name, treatment from ROS_ACTIVITY_TYPES' to see the corresponding activity types and treatments.

Special leave treatments

Leave requests in the dashboard are shown in two tabs. Normal leave and special leave. This setting determines in which section leave is shown.

- Folder: **Portals**, Setting: **SpecialLeaveTreatments**
  Database values for special leave. If the treatment is not corresponding, the leave request is shown as normal leave.

  Default value = **Leave**

  > Treatments are visible in the database. Run query 'select name, treatment from ROS_ACTIVITY_TYPES' to see the corresponding

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activity types and treatments.

2.1 Permissions

Permissions are available to allow Managers to use ORTEC Workforce Scheduling for Managers.

More information regarding user groups and adding permissions to user groups is available in the **ORTEC Workforce Scheduling 7 Implementation Manual Access Control.**

This chapter describes the available permissions regarding ORTEC Workforce Scheduling for Managers.

Managers

This paragraph describes the authorizations for managers to use the ORTEC Workforce Scheduling for Managers functionality. In order to allow managers to use all functionality, the following authorizations are needed:

- Permissions category **Applications**.
- Permission category ORTEC Workforce Scheduling for Managers, all permissions.
- Permissions category **Reports**, permissions for the reports that need to be available for the employees in ORTEC Workforce Scheduling for Managers.

Below you will find an overview of the required authorizations for different functionality for employees.

Access to ORTEC Workforce Scheduling for Managers

Permission Category	Permission / Caption	Description
Applications	ORTEC Workforce Scheduling for Managers	To allow a user access to ORTEC Workforce Scheduling for Managers. Required for all managers using ORTEC Workforce Scheduling for Managers functionality.

(Special) leave requests

Adding, approving or declining (special) leave requests on the **Dashboard** page in ORTEC Workforce Scheduling for Managers is dependent on permissions:

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Permission Category	Permission / Caption	Description
Leave requests	Add regular leave request	To allow a user to add a regular leave request
Leave requests	Add special leave request	To allow a user to add a special leave request
Leave requests	Approve regular leave request	To allow a user to approve a regular leave request
Leave requests	Approve special leave request	To allow a user to approve a special leave request
Leave requests	Decline regular leave request	To allow a user to decline a regular leave request
Leave requests	Decline special leave request	To allow a user to decline a special leave request

Approve pending shift updates

Approving or declining pending shift updates in the **Approval** page in ORTEC Workforce Scheduling for Managers is dependent on permissions:

Permission Category	Permission / Caption	Description
Approve pending shift updates	Approve pending shift updates for shifts with status published	To allow a user to approve pending shift updates for shifts with status published
Approve pending shift updates	Approve pending shift updates for shifts with status closed	To allow a user to approve pending shift updates for shifts with status closed
Approve pending shift updates	Approve pending shift updates for shifts with status approved or higher	To allow a user to approve pending shift updates for shifts with status approved or higher
Approve pending shift updates	Decline pending shift updates for shifts with status published	To allow a user to decline pending shift updates for shifts with status published
Approve pending shift updates	Decline pending shift updates for shifts with status closed	To allow a user to decline pending shift updates for shifts with status closed
Approve pending shift updates	Decline pending shift updates for shifts with status approved or higher	To allow a user to decline pending shift updates for shifts with status approved or higher

Insight

Insights can be made available on the **Insights** page in ORTEC Workforce Scheduling for Managers to provide relevant information to your managers. See "Add insights" on page 5 how to add an insight. In case a user is entitled to use the account that corresponds with the selected insight, this user is only entitled to see the insight that he/she is authorized for.

Permission Category	Permission / Caption	Description
Accounts/Insights	Accounts	To allow a user to add an insight that is linked to the corresponding account.

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Reports

MS Reporting reports can be made available on the **Insight** page in ORTEC Workforce Scheduling for Managers to provide relevant information to your managers. In case a user is entitled to use the **Accounts report**, this user is only entitled to see the accounts that the user is authorized for in this report.

Permission Category	Permission / Caption	Description
Reports (Microsoft)	Reports	Reports available

All reports in ORTEC WS for Employees use the current month as default period

2.2 Add insights

In the insights page, managers can choose their own insights. The list of insights that can be chosen by a manager, is created by the application manager. These insights can be defined in a separate page.

Insights are based on an account in the Windows Client. Before adding an insight, be sure that an account is available to create an insight for. To guarantee the performance of the insight, it is recommended to use the expression 'carry over per cost center' to make sure there is only one booking per account category per month.

Contact ORTEC for support if necessary to create specific accounts that can be used as insight.

How to use

Add insight

Login to ORTEC Workforce Scheduling for Managers with a user that has the permission of the account for which you want to add an insight. This user (application manager) should also have the permission Configuration (category ORTEC Workforce Scheduling for Managers).

1. Click on the menu item **Configuration**.
2. Click **Add account setting**.
3. Select the account, chart type and period. Click the checkbox 'Default for all users' if you want to make this insight default available for all users without

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adding it by themselves (if they have the permission for the account). **Click Add account setting**.
4. Now the insight is added. This insight is now available for a manager. This manager can only see the insight if this user has the read permission on the account of the insight.

2.3 Group shifts

In the application, you can group shifts in the schedule and in the staffing page.

How to use

Group shifts

Open the ORTEC WS Windows client.

1. Go to Planning, schedule management. Select a department, tab dutysets. Open the active dutyset.
2. Go to tab description. Now fill in the duty type. Fill in the same name for all shifts you want to be grouped. For example, fill in 'Evening' for all evening shifts. Now all evening shifts are grouped in ORTEC Workforce Scheduling for Managers.

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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

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