ORTEC for Field Service

Resource Manager

User Manual

December 2025

Published: December 15, 2025

Version: 2025.1688506

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1 Resource Manager: Overview

ORTEC for Field Service requires access to availability and skills data of resources for task scheduling. The Resource Manager interface of ORTEC FS provides functionalities to manage specific resource data for the purpose of task scheduling. A user can import the resource master data via APIs. This data can be managed from the Resource Manager interface. You can also add or manage new resource data.

By providing a separate and distinct Resource Manager interface, ORTEC FS keeps resource master data management functions away from the Operational Planner interface and the task scheduling and shift optimization features that it supports.

1.1 User interface

Depending on your configuration, you might not have access to the following tabs: **Availability pattern**, **Properties**, **Rules**, and **Vehicle**.

Resource Manager interface provides access to the availability and skills data pertaining to the resources (regular and contract employees) of various departments in the organization. Each department master data can be handled by the corresponding resource manager. You can have access to one or more departments. Master resource data belonging to each department is kept separate from that of other departments.

The **Employees** tab in the **Resource Manager** application enables you to:

- manage employees and their skills
- maintain availability pattern of each employee, and record the unavailability of resources
- provide details of available resources to the Operational Planner interface to enable planning and scheduling of service tasks

On signing in, you can access the department(s) that you need to manage. The records of the employees in the department are listed.

2 Sign in

The signed in users can then access their department. Users who have access to multiple departments can select the department from the list displayed or use the **Recent Departments** section to access the departments that they frequently access.

2.1 How to sign in

To sign into the application:

1. Open the URL in a supported browser.
2. Optionally, click English (United States) to select the language. You can select the language in the application interface also.
3. Click **Sign in**.
   - If you're signing in for the first time, enter your username and password. You're logged in to the application interface.
   - If you've signed in earlier, you can select your account from the **Pick an account** window to sign in.
   - If you want to use another authorized account, click **Use another account** and provide an authorized username and password to sign in.

     > If you don't want your account name to be displayed in the **Pick an account** window, click ⋮ adjacent to the account name and then, click **FORGET**. This ensures that your account name isn't retained for future use.

If required, after signing in you can change the display theme. The default theme can be replaced by a dark theme for a different visual experience.

To enable dark theme, click your user name in the upper-right corner of the application window, and select **Dark theme**.

3 Sign out

3.1 How to sign out

To sign out from the application:

1. Click your ORTEC FS account name, displayed in the upper-right corner of the application.
2. Click **Sign out**. After you sign out, the **Sign in** page is displayed.

On signing out from ORTEC FS, the login page is displayed again.

4 Manage employee data

The Resource Manager interface lets you manage resource master data imported via APIs. The interface also lets you add and manage new employee data. The master resource data managed in the Resource Manager is made available to Operational Planner thereby enabling it to handle resource shift scheduling in an efficient way.

> Depending on your configuration, you might not have access to the following tabs: **Availability pattern**, **Properties**, **Rules**, and **Vehicle**. If shift generation is not active, only **Employee** and **Unavailable** tabs will be visible in the Resource Manager application.

The **Employees** tab in the **Resource Manager** application enables you to:

- manage employees and their skills
- maintain availability pattern of each employee, and record the unavailability of resources
- provide details of available resources to the Operational Planner interface to enable planning and scheduling of service tasks

- "Add employee record" on page 7
- "Modify employee record" on page 9
- "Find employee record" on page 10
- "Remove employee record" on page 10

4.1 Add employee record

You can add a regular or contract employee, and manage their skills, availability, and unavailability. You can add an employee by providing the first name and last name of the person. Employee skills, availability pattern, and unavailability details can be added either while adding an employee, or later.

> When you add multiple employees with same set of skills or same availability pattern, provide only the basic details of the employees, and the common details such as skills or availability pattern.

4.1.1 How to add an employee record

To add an employee:

1. On the **ORTEC Field Service Suite** landing page, make sure the **Applications** tab is selected.
2. Select the **Resource Manager** tile; the **Resource Manager** application will open on a new tab.
3. On the **Departments** page, search for and select a department.
4. Make sure the **Employees** tab is selected and click **Add employee**.
5. (Required) In the **Employee Information** section, provide the **First name** and **Last name**.

- With automatic shift generation enabled, provide all other details. When empty, no shifts will be generated for this employee.
- With automatic shift generation not enabled, you can continue with step 9 and fill out the details later.

6. Fill out the **Address**, **Phone number**, and/or **Email address** of the employee.
7. Define an employee **ID**.

- The employee ID should be unique. When no value is provided the ID will be generated. It can't be changed after saving.
- The minimum length of the identifier is 1 character. The maximum length is 256 characters.
- The allowed characters are letters (lowercase and uppercase, i.e., a-z and A-Z), numbers (0-9), and the following special characters: '-', '.', '_', '~'

8. Define a **Reference**.
9. To **Enter tag**, define a tag and click **Add +**.

Tags are used to sort and filter employees in the **Operational Planner** application.

10. Click **Next**. The **Availability pattern** page is displayed. If you prefer to skip this step and add this information later, continue with step 7.
    - Click and select a contract end date.
    - Select **Add pattern**.
    - Click and select a date from which you want the availability pattern to take effect.
    - Specify the availability pattern by adding availability periods. For details, refer to "Add availability pattern" on page 17.
11. Click **Next**. The **Properties** page is displayed. If you prefer to skip this step and add this information later, continue with step 8.
    - Click **Add skill** to start adding skills. For details, refer to "Add properties for a single employee" on page 21
    - Click **Add task type** to start adding task types.
    - Click **Add tag** to start adding tags.
12. Click **Next**. The **Rules** page is displayed. If you prefer to skip this step and add this information later, continue with step 9.
    - Click **Add factor** to start adding task duration factors.
    - Click **Add travel time** to start adding travel times outside shifts.
    - Click **Add maximum distance** to start adding maximum distances.
    - Click **Add minimum available time** to start adding minimum available times. An employee's minimum available time rules take precedence over those set for the department.

Multiple values can be assigned to each property and rule. These values can be set to be active during specific time periods. When generating a shift for a particular day, all values active during that day will be applied to the shift. Any shifts already generated, which are not in the past, will be automatically updated if a rule or property is modified.

13. Click **Add employee** to complete adding the employee record. A message confirms the addition of the employee.

4.2 Modify employee record

You can modify any employee record. Changes made in **Resource Manager** will reflect in the corresponding shifts displayed in the **Operational Planner**.

With automatic shift generation enabled, you can adjust all details. Otherwise, you can only edit employee and unavailability information.

- Employee data: All details in the **Employee Information** panel can be modified.
- Unavailable: You can add, edit or remove unavailability details or periods of absence for the employee.
- Availability pattern: You can make changes to the employee's weekly availability pattern by adding, editing or removing availability periods.
- Properties: You can add/edit/remove one or more skills, allowed task types, and/or shift tags.
- Rules: You can add/edit/remove one or more task duration factors, travel times outsides shifts, and/or maximum distances.
- Vehicle: You can add/edit/remove one or more vehicles.

4.2.1 How to modify an employee record

To modify an employee record:

1. Click the employee record that you want to modify. The employee details are displayed.
2. To make changes to details in **Employee Information**, click **Edit** in that panel, make the required changes and click **Save**.
3. To make changes to employee unavailability records, go to **Unavailable** tab.
   - To add an unavailable time record, click **Add unavailable time**, choose the unavailable time type, and specify the details.
   - To remove an unavailable time entry from the employee calendar, click the entry, and click **Delete**.
   - To edit an unavailable time entry displayed in the employee calendar, click the entry, make the required changes, and click **Save**.
4. To make changes to employee availability pattern, go to **Availability pattern** tab, click **Edit**, make the required changes, and click **Save**. You can choose the date on which the changes will take effect.
   - To add availability pattern click either **Add pattern** to specify a pattern based on the department template, or use **Add availability period** to add individual availability periods to define the required pattern.

- To modify availability pattern by modifying availability periods, click the availability periods in the pattern, and make changes.
- To remove availability pattern, remove the availability periods. You can click an availability period, and select **DELETE** to remove the period.

5. To make changes to properties, go to **Properties** tab, click **Edit**, make the required changes, and click **Save** to save the changes.
    - To add a property, click **Add skill / Add task type / Add tag** and specify the details.
    - To modify a property, make changes in the required fields.
    - To remove a property, click .
6. To make changes to rules, go to **Rules** tab, click **Edit**, make the required changes, and click **Save** to save the changes.
    - To add a rule, click **Add factor / Add travel time / Add maximum distance** and specify the details.
    - To modify a rule, make changes in the required fields.
    - To remove a rule, click .
7. To make changes to vehicles, go to **Vehicles** tab, click **Edit**, make the required changes, and click **Save** to save the changes.
    - To add a vehicle, click **Add vehicle** and specify the details.
    - To modify a vehicle, make changes in the required fields.
    - To remove a vehicle, click .

4.3 Find employee record

In the page listing the employees of the department, you can search for a specific employee record. You can click the required employee record or select the record to access the details and perform the required function such as adding a skill or unavailability.

4.3.1 How to search for an employee record

To search for an employee record:

1. In **Search employees** enter the employee name in part or full. You can also use employee number as the search keyword.
2. Locate the employee record from the search result. If required, you can use the search field again to further filter the search results and find the required employee record. You can click to return to the employee list.

4.4 Remove employee record

When employees move from one department to another, or when an employee contract is no more valid, you might want to remove the employee record from a department.

4.4.1 How to delete an employee record

To delete an employee record:

1. Click the employee record to be deleted. The employee details are displayed.
2. Click **Delete employee** in the **Employee information** section. You are asked to confirm if you want to delete the employee.
3. Click **Delete**. A message appears confirming the deletion.

4.5 Bulk data updates

You can select one or more employees, or all the employees belonging to a department. This allows you to add skills, specify employee unavailability, or change employee availability pattern simultaneously for the selected employees. This saves time, and reduces chances of human error when similar updates are required for multiple employees.

> **Example**
> If a training is scheduled for 13 employees, and if you want to record their unavailability to attend any field work during the training time, you can select all the required employees and update the unavailability details for them, all at once.

The following options are available on selecting multiple employees for bulk update of employee data:

- **Add properties**: You can add one or more skills, allowed task types, and/or shift tags to selected employees.
- **Add availabilities patterns**: You can change the availability pattern of selected employees by using a template or by adding, editing or removing availability periods.
- **Add unavailable time**: You can add a private appointment, vacation, or other absence for selected employees.

If the update fails for one or more of the selected employees, a message displays to inform the same.

4.5.1 How to select and modify multiple employees

> In the page listing the employees, you can use **Search employees** to search for an employee based on employee name or employee number.

To modify data of multiple employees:

1. Select employees whose data you want to modify. The **Selected employees** bar is displayed at the top of the application window.

2. Based on the need, click either **Add properties**, **Add availability patterns**, or **Add unavailable times**.

3. Make the required changes. The changes are applied to all the selected employee records.

5.1 Manage employee unavailability

Employee unavailability data is as crucial for task scheduling as employee availability. **Resource Manager** provides ways to manage short or long periods of employee unavailability. You can choose from one of the following unavailability categories:

- Private appointment
- Vacation
- Meeting
- Sick
- Other

You can add multiple unavailability records on any date. For instance, an employee can have a 'Private appointment' from 10:00 AM to 11:00 AM, and 'Other' from 4:00 PM to 4:30 PM.

The employee calendar displays the unavailability records for the current or any selected month. When there are more unavailability records on a date, not all records are visible and highlighted. Numbers such as 2+ indicates such hidden records. For example, 2+ indicates that there are 2 more unavailability records on a date, than what's currently visible on the calendar. You can click on a highlighted record or number on the calendar, to view the associated records in the list displayed to the right of the calendar.

Unavailability records can be added simultaneously for multiple employees. However, you can modify or delete an unavailability record only from an employee's individual calendar.

You cannot select multiple employees and modify an unavailability record.

You can add unavailability records in the **Operational Planner** interface also. During task scheduling in the **Operational Planner** interface, the periods of unavailability specified in both the interfaces are taken into account. However, the unavailability records added in **Operational Planner** interface don't reflect in the **Resource Manager** interface.

5.1.1 Add absence

You can add one or more unavailability records for any selected date on an employee's calendar. When required, unavailability records can also be added for multiple employees simultaneously.

Example

If a few employees of the department are attending a training and aren't available for 3 hours on a specific day, you can select these employees and add '**Other**' with a note to indicate the training. The added unavailability period is displayed in each employee's calendar.

How to add an unavailability record

To add an unavailability record for an employee:

1. In the page listing the employees of the department, click the employee record. The **Unavailable** tab displays the employee's unavailability calendar for the month.
2. Select the month for which you want to add an unavailability record.
3. Click the date on which you want to add an unavailability record. The **Add unavailable time** window appears.

> **Multiple days**
>
> Alternatively, to specify a period of unavailability spanning multiple days, you can click on a start date in the calendar, and drag along to select all the days until the end date. The **Add unavailable time** window in this case, appears with the **Start date** and **End date** already filled.

- In **Type**, select the unavailability type.
- In **Start date**, select the date from when the unavailability period starts.
- In **End date**, select the date until when the employee is unavailable.

> To specify a start time and end time for the unavailability period, clear **All day** checkbox, and specify the **Start time** and **End time**. Example for a valid time format: 10:00 AM or 03:12 PM.

- To add a location, select the checkbox **Add a location**.
- To add more employees, select the checkbox **Add more employees**.
- In **Remarks**, provide additional information, if any. This is optional.
- Click **Add** button to add the unavailability record.

How to add unavailability record for multiple employees

To add an unavailability record for multiple employees:

1. Select the employees for whom you want to add an unavailability record. The **Selected employees** bar appears.
2. Click **Add unavailable time** and select the required unavailability **Type**.
3. In **Start date**, select the date from when the unavailability period starts.
4. In **End date**, select the date until when the employee is unavailable.
5. To specify a start time and end time for the unavailability period, clear **All day** checkbox, and specify the **Start time** and **End time**. Example for a valid time format: 10:00 AM or 03:12 PM.
6. To add a location, select the checkbox **Add a location**.
7. To add even more employees, search for and add more employees.
8. In **Remarks**, provide additional information, if any. This is optional.
9. Click **Add** button to add the absence record.

5.1.2 Modify absence

You can modify unavailability records of an employee. The **Unavailable** tab on **Employee details** page displays a calendar showing the days that have one or more unavailability records on them. Indications such as 2+ on some dates indicates that there are two more unavailability records on that date, though not visible on the calendar.

How to modify an employee unavailability record

To modify the unavailability record for an employee:

1. From the employee list, click the employee name. The **Employee Details** page is displayed.
2. Go to **Unavailable** tab. The calendar for current month is displayed.
3. Select the required month and year. Unavailability records, if any on the month, are displayed.
4. On the calendar, click on the required unavailability record. The corresponding **Edit** window appears.
5. Make the required changes.
6. Click **SAVE**. A message confirms the changes.

5.1.3 Remove unavailability

You can remove the unavailability record of an employee from the individual employee's calendar. The **Unavailable** tab on **Employee details** page displays a calendar showing the days that have one or more unavailability records on them. Indications such as 2+ on some dates indicates that there are two more unavailability records on that date, though not visible on the calendar.

How to remove an employee unavailability record

To remove an unavailability record of an employee:

1. From the employee list, click the employee name. The **Employee Details** page is displayed.
2. Go to **Unavailable** tab. The calendar for current month is displayed.
3. Select the required month and year. Unavailability records, if any on the month, are displayed.
4. On the calendar, click on the required unavailability record. The corresponding **Edit** window appears.
5. Click **Delete**. The **Delete unavailable time** window appears.
6. Click **Delete** to confirm and proceed. A message is displayed in green highlight to confirm that the record is deleted.

6.1 Manage availability pattern

Resource Manager lets you specify availability patterns for employees. An availability pattern indicates the weekly availability periods of an employee. Each pattern can have one to four weeks of availability periods specified. Employee shifts are generated based on the availability pattern specified for the employee. You can define multiple availability patterns for an employee and specify when a particular pattern will be applied. This gives you the flexibility to support irregular working schedules of employees.

> **Example**
>
> Employee X works from Monday to Thursday during July and August and on Monday to Friday the rest of the year. Employee Y doesn't work on every third Wednesday of the month. Flexibility to have multiple patterns, each with multiple weeks can support such situations.

You can specify an availability pattern for an employee in multiple ways:

- By using a template to apply a standard availability pattern for employees belonging to each department
- By defining an availability pattern for one or more employees by adding availability periods; the pattern can have the availability periods specified for one to four weeks
- By defining an availability pattern for one or more employees by using a template to apply the standard availability pattern, and making the required changes by adding, modifying or removing availability periods

Standard availability pattern using template

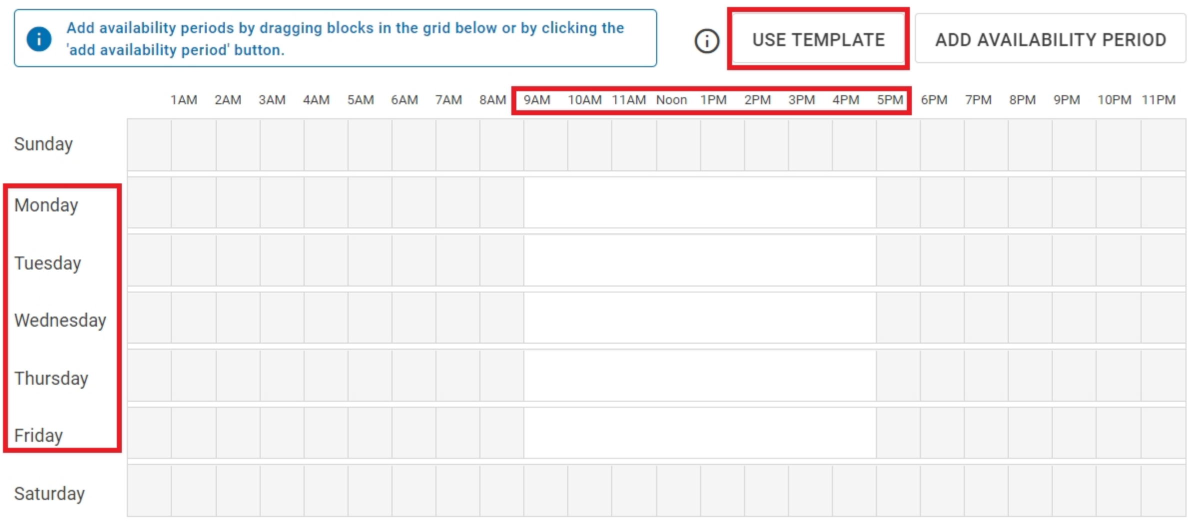
Availability template provides a quick and easy way to apply a standard availability pattern for one or more employees of a department. By default, the application provides a template that's based on the business hours of a specific department.

> **Example**
>
> Consider the case where most of the employees in Department A are scheduled to work from Monday to Friday between 8:00 AM and 5:00 PM. In such a scenario, while adding new employees to Department A, you can use the template to apply the standard employee availability pattern of the department.

6.1.1 Template-specified pattern

A template provides a quick and easy way to specify a standard weekly availability pattern for the employees belonging to a specific department. Availability template of each department is usually based on the business hours of that department. For example, if most of the employees in a department are working from Mondays to Fridays between 8:00 AM and 5:00 PM, the template for that department would specify this availability pattern.

It isn't mandatory to use a template to specify an availability pattern. Instead, you can define availability periods and specify an availability pattern for an employee.



In the screenshot above, the template when used, adds an availability pattern of 8 AM to 5 PM from Monday to Friday for the selected employees. The pattern specified by the template overrides any previously specified availability pattern for employee.

You can also apply the template, and then customize the pattern by making the required changes to the availability periods.

Using a template is not mandatory. Instead, you can specify the required availability pattern by adding availability periods using **Add availability period**.

How to use the template

On using a template, the current availability pattern (if any) of the selected employees for the selected date, will be overwritten.

To specify availability pattern using a standard template:

To add availability pattern using a template for a single employee, you can click the employee name from the list of employees, go to **Availability pattern**, click **Edit**, and then proceed from Step 3 below.

1. Select the employees for whom you want to specify the availability pattern. The **Selected employees** bar appears.
2. Click **Add availability patterns**. The **Add availability pattern** page appears. The page displays a 24-hour availability grid for a week. Each row of the grid represents a day of the week, and each column in the row represents an hour.
3. Click **Use template** to add the availability patterns based on the template (if a template is available).

4. Optionally, you can add, edit or remove availability periods to customize the availability pattern.
5. Click **Save**. The **Save availability pattern** window appears displaying a calendar.
6. Select the date from when you want the availability pattern to take effect.
7. Click **Save** to complete the changes. You'll get a message confirming the changes.

The new availability pattern will take effect from the date specified. Till that date, on accessing the employee's **Availability pattern** tab, you've the option to edit or remove the availability pattern.

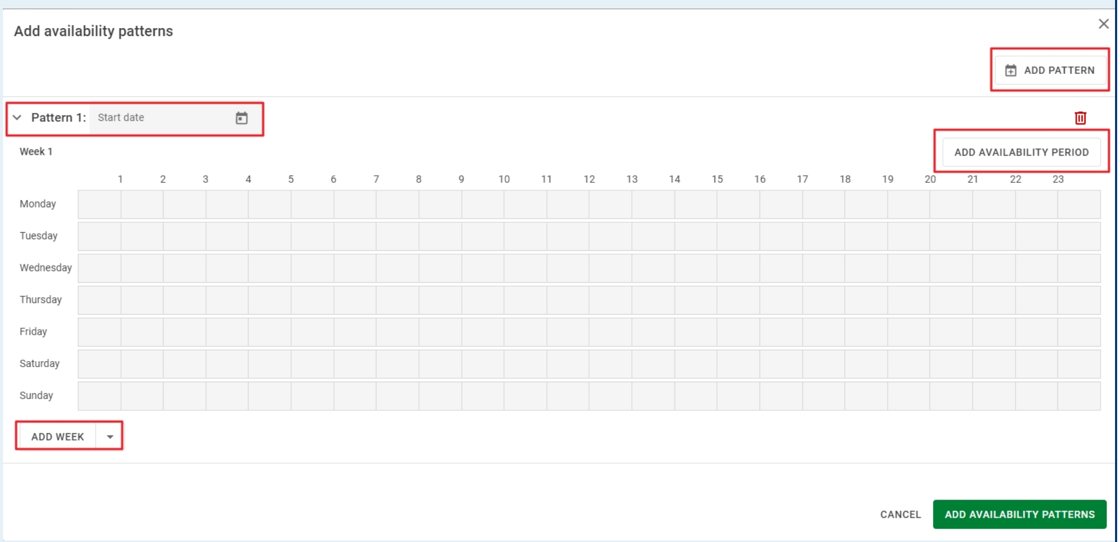
6.1.2 Add availability pattern

Based on the need, you can define multiple availability patterns for an employee by specifying the date from when a pattern will be 'Active'. Employee shifts are generated based on the active availability pattern. At any point of time, there will be only one 'Active' availability pattern. When you click an **Availability pattern** for an employee, all the availability patterns defined for the employee are listed. This includes the active pattern, the upcoming patterns, and the expired patterns.

Each pattern consists of a 24-hour availability grid for each week defined in the pattern. You can define one to four weeks in an availability pattern.

The grid displays the employee availability periods for the week. Each row of the grid represents a day of the week, and each column in the row represents an hour. Availability pattern can be added for a single employee or for a selected group of employees. You can specify the availability pattern by adding availability periods for each day of the week.

Example



You can use **Add availability period** to add individual availability periods to define the required pattern. You can also specify the employee availability periods by clicking on any block on the availability grid, and dragging to select the required blocks.

Example

Click on the availability record for Tuesday under the column 7 AM, and drag the cursor until 3 PM. This will add an availability period from 7:00 AM to 3:00 PM on Tuesday. You can also drag across multiple days if the availability period of the employee is the same on all the selected days.

How to add an availability pattern

When you select multiple employees to define an availability pattern, previously defined pattern for those employees for the same period, are over-written.

To add or modify the availability pattern of a single employee, you can click the employee record, go to **Availability pattern** tab, click **Edit**, and then proceed from Step 2 below.

To add availability pattern to one or more employees:

1. Select the employee(s) for whom you want to add or modify the availability pattern. The **Selected employees** bar appears.
2. Click **Add availability patterns**. The **Add availability patterns** page displays an empty grid for a new pattern. This is the availability period for one week. If required, you can click **Add week** to add up to four weeks. An availability grid appears for each week.
3. Select the **Start date** for the pattern. A '-No end date' text appears.

   While defining a pattern, you needn't specify an end date. When there is more than one pattern defined, the start date of a following pattern will automatically be the end date of the previous pattern.

4. To add availability periods, click on the required day and time of the day on the weekly grids, and drag it to select the employee availability for the day. You can drag to select multiple days if the employee availability is the same for the selected days.
5. Alternatively, to specify availability period for a day, click **Add availability period** and in the **Availability period** window, select the day of the week, and specify the **Start time** and **End time**.

   Add availability periods as required. For example, you can have 2 availability periods on Monday, one from 8:30 AM to 12:30 AM, and the second one from 1:30 PM to 5:30 PM. You can also add availability periods for different days of the week.

6. To make any changes to any availability period, click the availability period and make the required changes.

7. To remove an availability period from the pattern, click the availability period, and click **Delete**.

8. If required, click **Add pattern** to specify another pattern. Based on the start date of the new pattern, an end date is automatically added to the previous pattern.

9. If required, use to remove a pattern.

10. Click **Add availability pattern** to add the pattern.

6.1.3 Modify availability pattern

Availability pattern of an employee can be modified whenever there is a need. Availability patterns with the status 'Expired' can only be removed while 'Active' and 'Upcoming' patterns can be modified.

Changes to the availability patterns can have an immediate effect on operational planning. When you move or change availability periods, the planned shifts will move accordingly. When you delete availability periods, all tasks on planned shifts (if any) based on that availability period, are removed after unscheduling all planned tasks.

You can add or remove weeks from an 'Active' or 'Upcoming' availability pattern. You can make changes to the availability periods specified for any week by adding, modifying or removing availability periods.

Example

You can add or remove weeks from an 'Active' or 'Upcoming' availability pattern. You can make changes to the availability periods specified for any week by adding, modifying or removing availability periods.

How to edit or remove availability periods

To edit or remove availability periods:

1. Click the employee record. This displays the employee details.
2. Go to **Availability patterns** tab. The available patterns are listed.
3. Click **Edit**. The **Edit availability pattern** panel appears.
4. Make the required changes:
   - To add availability periods, click **Add availability period**; you can also click on the availability grid and drag to specify the availability period.
   - To modify an availability period, click on the period and make the required changes.
   - To remove an availability period, click on the period and click **Delete**.
   - To add a pattern, click **Add pattern**. You can add as many patterns as you need to manage the employee availability period.
   - To remove a pattern, click .
   - To add a week to a pattern, click **Add week**.
   - To duplicate or make a copy of a week, click the arrow on the **Add week** button for that week, and select **Duplicate week**.
   - To remove a week, click **Delete** week.

5. Click **Save** to save the changes to the availability pattern. In the confirmation window, click **Save** again to apply the changes.

7.1 Manage properties

Each department maintains a list of properties. One, more, or all of these properties might be applicable to an employee. You can add properties at the time of adding an employee, or anytime later. You can also modify or delete the properties associated with an employee.

7.1.1 Add employee properties

Each department maintains a list of properties. One or more of these properties might be applicable to the employees of the department.

You can add properties at the time of adding an employee, or anytime later. The **Properties** tab of an employee lists the current and upcoming skills, task types and/or tags, associated with the employee.

Each property is associated with a **Valid from** and **Valid till** date. This indicates the period during which a property is available as a service. You needn't specify a **Valid till** date if the property has no expiry date.

Status of the property indicate whether a property is currently available as a service from the employee or if the property is no more in offer, or if a property is being offered from a future date.

> **Example**
> If you added a skill on January 1, 2021 with June 1, 2021 as the **Valid from** date and December 31, 2021 as the **Valid till** date. This skill when added, will display the status **Upcoming**. From June 1, 2021 to December 31, 2021, its status will be **Active** and after December 31, 2021, the status will change to **Expired**.

Add properties for a single employee

Employee properties can be added either at the time of adding an employee record or later. While adding properties for a single employee, it's better to click the employee record and add the property from the **Properties** tab.

You can also select one or more employees, and click **Add properties** in the **Selected employees** bar to add common properties.

> While using **Add properties** in the **Selected employees** bar, if the validity period of a property being added clashes with the same property record already present for any one the employees, you'll receive an alert.

How to add properties for an employee

To add properties for an employee:

1. Click the employee record. The employee details are displayed.
2. Go to **Properties** tab. The existing properties for the employee, if any specified, are listed.
3. Click **Edit**. The **Add skill**, **Add task type**, and **Add tag** buttons appear.

4. To add a property, click the appropriate button. This adds a new property record.
5. Select the required skill, task type, or tag from the list. Only those properties available within the department appears in these lists.
6. In **Valid from**, specify the date from when the property will be available. Optionally, you can specify a **Valid till** date to specify a period when the property will be valid.

> You can add the same property with a different date range. The dates provided in **Valid from** and **Valid till** can't overlap.

7. If required, click **Add skill**, **Add task type**, or **Add tag** to add more properties.
8. Click **Add properties** to save the changes.

Add properties for multiple employees

You can select multiple employees and add one or more selected properties simultaneously to them. If any of the properties being added are already present as a current or upcoming property for any of the selected employees, those property records are updated based on the **Valid from** date that you specify.

How to add properties for multiple employees

To add properties for multiple employees:

1. Select the employees for whom you want to add the properties. The **Selected employees** bar appears.
2. Click **Add properties**. The **Add properties** window appears.
3. Select **Add skill**, **Add task type**, or **Add tag**.
4. Choose the required skill, task type or tag from the list. The list displays all the skills, task types, or tags available for the department.
5. In **Valid from**, select the date from when the property would be applicable.
6. To add more properties, repeat steps 3 to 5.
7. To confirm the changes, click **Add properties**. Message in green confirms the addition of properties to the selected employees.

7.1.2 Edit employee properties

From the **Resource Manager** interface, you can edit employee properties. In the edit mode, you can add, modify, or remove properties.

How to modify employee properties

To modify properties:

1. Click the required employee record. The **Employee information** page is displayed.
2. Go to **Properties** tab. All the current and upcoming properties of the employee are listed.
3. Click **Edit**. This enables the edit mode.
   - To add a property, click **Add skill**, **Add task type**, or **Add tag**. If all available properties are already added, the respective button appears disabled.
   - To modify a property, make the required changes to the corresponding property record.
   - To remove a property, click corresponding to the property record.
4. Click **Save**. The changes are saved.

How to remove a property

To remove a current or upcoming property, click 🗑 corresponding to that property record. No confirmation is asked before removing a property. However, a property that is removed can be added sanytime again to the employee.

7.2 Manage rules

Each department maintains a list of rules. One, more, or all of these rules might be applicable to an employee. You can add rules at the time of adding an employee, or anytime later. You can also modify or delete the rules associated with an employee.

7.2.1 Add rules

Employee rules can be added either at the time of adding an employee record or later. When adding rules for a single employee, it's better to click the employee record and add the rule from the **Properties** tab.

> The configuration of rules in the **Resource Manager** application is only available if shifts are generated by ORTEC.

How to add rules for an employee

To add rules for an employee:

1. Click the employee record. The employee details are displayed.
2. Go to **Rules** tab. The existing rules for the employee, if any specified, are listed.
3. Click **Edit**. The **Add factor**, **Add travel time**, **Add maximum distance**, and **Add minimum available time** buttons appear.

   > An employee's maximum distance and minimum available time rules override those set for the department.

4. To add a rule, click the appropriate button. This adds a new rule record.
5. Define the rule.
6. In **Valid from**, specify the date from when the rule will be available. Optionally, you can specify a **Valid till** date to specify a period when the rule will be valid.

   > You can add the same rule with a different date range. The dates provided in **Valid from** and **Valid till** can't overlap.

7. If required, click **Add factor**, **Add travel time**, **Add maximum distance**, or **Add minimum available time** to add more properties.
8. Click **Save** to save the changes.

7.2.2 Modify or delete rules

From the **Resource Manager** interface, you can edit employee rules. In the edit mode, you can add, modify, or remove rules.

How to modify employee rules

To modify rules:

1. Click the required employee record. The **Employee information** page is displayed.
2. Go to **Rules** tab. All the current and upcoming rules of the employee are listed.
3. Click **Edit**. This enables the edit mode.
   - To add a rule, click **Add factor**, **Add travel time**, **Add maximum distance**, or **Minimum available time**. If all available rules are already added, the respective button appears disabled.
   - To modify a rule, make the required changes to the corresponding rule record.
   - To remove a rule, click 🗑 corresponding to the rule record.
4. Click **Save**. The changes are saved.

How to remove a rule

To remove a current or upcoming rule, click 🗑 corresponding to that rule record. No confirmation is asked before removing a rule. However, a rule that is removed can be added anytime again to the employee.

7.3 Manage vehicles

One or more vehicles can be assigned to an employee. You can add, modify, or delete vehicles assigned to an employee.

7.3.1 Add vehicle

1. Click the employee record. The employee details are displayed.
2. Go to **Vehicle** tab. The assigned vehicles for the employee, if any specified, are listed.
3. Click **Edit**.
4. Click the **Add vehicle** button. This adds a new vehicle record.
5. Select the vehicle.
6. In **Valid from**, specify the date from when the vehicle will be available. Optionally, you can specify a **Valid till** date to specify a period when the vehicle will be valid.

> ⚠ You can add the same vehicle with a different date range. The dates provided in **Valid from** and **Valid till** can't overlap.

7. If required, click **Add vehicle** to assign more vehicles.
8. Click **Save** to save the changes.

7.3.2 Modify vehicle

1. Click the required employee record. The **Employee information** page is displayed.
2. Go to **Vehicle** tab. All the current and upcoming vehicles of the employee are listed.
3. Click **Edit**. This enables the edit mode.
   - To add a vehicle, click **Add vehicle**. If all available vehicles are already added, the button appears disabled.

- To modify a vehicle, make the required changes to the corresponding vehicle record.
- To remove a vehicle, click 🗑 corresponding to the vehicle record.

4. Click **Save**. The changes are saved.

7 Manage vehicle data

The Resource Manager application lets you manage resource master data imported via APIs. The application also lets you add and manage vehicle data. The resource data managed in the Resource Manager is made available to Operational Planner thereby enabling it to handle resource shift scheduling in an efficient way.

The **Vehicles** tab in the **Resource Manager** application enables you to:

- manage vehicles
- view assignments per vehicle
- provide details of available vehicles to the Operational Planner application

7.4 Add vehicle

1. On the **ORTEC Field Service Suite** landing page, make sure the **Applications** tab is selected.
2. Select the **Resource Manager** tile; the **Resource Manager** application will open on a new tab.
3. On the **Departments** page, search for and select a department.
4. Make sure the **Vehicles** tab is selected and click **Add vehicle**.
5. In the **Add vehicle** window, provide the following:
   - (Required) **License plate**
   - (Optional) **Reference**
     This can help identify the vehicle and you'll be able to search on the defined reference.
   - **ID**
     For example, the ID of the vehicle in your own ERP (Enterprise Resource Planning). Using your own IDs can be helpful if you want recognizable IDs and need to transfer vehicle data from OFS to your ERP system. The vehicle ID should be unique. When no value is provided the ID will be generated. It can't be changed after saving.
6. Select **Save**.

With shift generation active, the vehicle can be connected to an employee via the **Employee** page in **Resource Manager** with a from and till date. Changes in the vehicle assignment can be updated in **Operational Planner** for all shifts that will be generated in future or existing shifts (that are not in the past).

7.5 Manage vehicles

Once one or more vehicles have been added, you can manage them. Click a vehicle record to view the vehicle details.

7.5.1 View vehicle assignments

In the **Assignment of vehicle** section, view the employee(s) assigned to this vehicle, from and until a specific time.

An error is shown if the vehicle is assigned to multiple employees in the same time frame.

The assignment information can't be edited here. Changes must be made directly on the employee. Select the employee's name to quickly navigate to their profile in the **Employee** section of the **Resource Manager** and update the vehicle assignment via the **Vehicle** tab.

7.5.2 Modify vehicle

1. In the **Vehicle information** section, select **Edit**.
2. Update the **License plate** and/or **Reference**. The **ID** can't be edited after creation.
3. Click **Save** or - if you want to revert back - select the cross in the top right corner.

7.5.3 Delete vehicle

1. In the **Vehicle information** section, select **Delete vehicle**.
2. To confirm, select **Delete**.

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.